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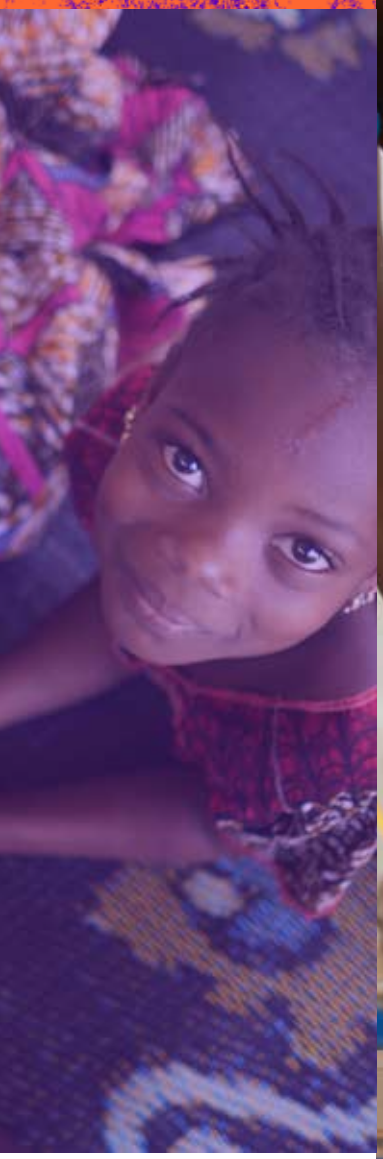
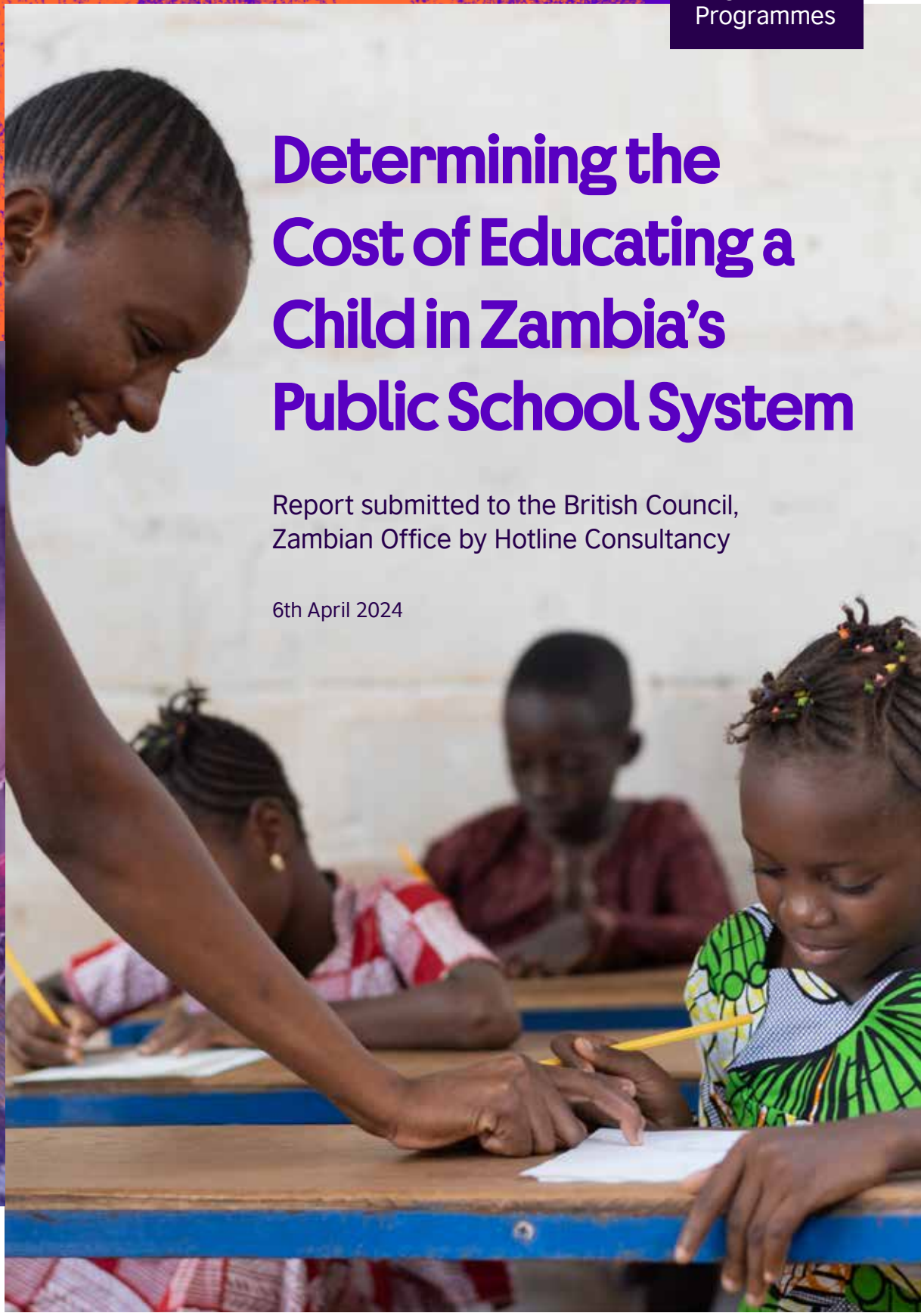


Determining the Cost of Educating a Child in Zambia's Public School System

Report submitted to the British Council, Zambian Office by Hotline Consultancy

6th April 2024



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Acronyms And Abbreviations

8NDP	Eighth National Development Plan
AIDS	Acquired Immune Deficiency Syndrome
COVID-19	Coronavirus Disease of 2019
CPD	Continuing Professional Development
CDC	Curriculum Development Centre
CSO	Central Statistical Office
DEBS	District Education Board Secretary
DESO	District Education Standards Officer
ECE	Early Childhood Education
EDGE	Empowerment and Development for Girls Education Component
EMIS	Education Management Information System
ESSP	Education and Skills Sector Plan
GDP	Gross Development Product
GER	Gross Enrolment Ratio
GPE	Global Partnership for Education
GPF	General Purpose Fund
GRZ	Government of the Republic of Zambia
HIV	Human Immunodeficiency Virus
ICT	Information Communication Technology
ITAP	Independent Technical Advisory Panel
JICA	Japanese International Cooperation Agency
MoE	Ministry of Education
NGO	Non-Governmental Organization
PEO	Provincial Education Officer
PTC	Parent Teachers Committees

SDG	Sustainable Development Goal
STEM	Science, Technology, Engineering and Mathematics
TESS	Teacher Education and Specialised Services
TEVET	Technical Education and Vocational Training
TEVETA	Technical Education, Vocational, Entrepreneurship Training Authority
TMIS	Teacher Management Information System
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNICEF	United Nations Children's Fund
USAID	United States Agency for International Development
VVOB	Flemish Association for Development Cooperation and TA
ZANEC	Zambia National Education Coalition
ZamStat	Zambia Statistics Agency
ZEEL	Zambia Enhancing Early Learning
ZEEP	Zambia Education Enhancement Project
ZOCS	Zambia Open Community Schools

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Executive Summary

The British Council commissioned the cost of education study on behalf of the Ministry of Education to determine the cost of education per child in a public school in Zambia. The Free Education Policy in Zambia is a government initiative aimed at expanding access to education and reducing barriers for children in the country. Zambia faces significant challenges in its education system, including low progression rates, especially at the secondary level, high dropout rates, and limited access to quality education. The Free Education Policy was introduced in 2015 in response to these challenges and to fulfil Zambia's commitment to achieving the United Nations' Sustainable Development Goal (SDG) 4, which focuses on inclusive and equitable quality education for all. The primary objective of the Free Education Policy is to ensure that every child has access to quality primary and secondary education, regardless of their socio-economic background, by eliminating tuition fees and other direct costs associated with basic education in government-run schools. In 2022, the government extended the policy of free education from covering only primary education to also include secondary education to increase educational accessibility and reduce barriers for children.

The true unit cost of education has not been well-documented in Zambia. It was against this backdrop that the British Council, under its Empowerment for Development of Girls Education (EDGE) project in Zambia, set out to conduct a costing exercise to establish the real cost of educating a child in a public school. This consultancy was initiated to fill this critical information gap and thereby commission the study. The overall objective of the study was to support the GRZ in developing a costing framework that reconciles school- and household-based costs of educating children through the public school system, while accounting for institutional type and spatial considerations related to rural, urban, and remoteness, and determining current unit costs of providing education. This information will be used to guide more equitable school financing and increase the effectiveness of the implementation of the Free Education Policy.

The research employed a nested approach, also known as the embedded method, which integrates both quantitative and qualitative data collection methods to offset the inherent strengths and weaknesses of each. The study on determining the cost of education per child employed this method to provide a comprehensive analysis of the true cost of education within the public school set-up in Zambia. The study was conducted at the national, provincial, district, school and household

levels in five (5) target provinces. Specifically, the selected study sites included Copperbelt, Eastern, Luapula, Lusaka and Southern Provinces. For the whole study, a sample of 1071 respondents and participants was selected using both purposive sampling (including gender and the inclusion of marginalised learners, based on the latest statistical data from the Ministry of Education) and random sampling techniques from the headquarters and 15 districts in five (5) targeted provinces. At headquarters, provincial and district level, various categories of individuals and stakeholders, including key government officials, Cooperating Partners (CPs), Civil Society Organisations (CSOs), Faith Based Organisation (FBOs), International NGOs and households, community gatekeepers and learners with disabilities were

purposively sampled to provide qualitative and quantitative data through in-person interviews and FGDs. The data collected helped address the consultancy's main purpose: establishing the cost of educating learners in public schools.

The overall findings of this study indicate that the actual costs of education far exceed what is currently provided through the Ministry of Education's funding mechanism. Specifically, the research findings show that the annual cost of secondary education per child is estimated at K13,746 (USD 573). At the same time, that of Primary and Early Childhood Education (ECE) stands at K12,518 (USD 522). The costs for primary and ECE are lumped together due to the co-location of primary schools and ECE. After further probing, the study estimated what might be reasonable for the costs, expressed as average mean unit costs for secondary and Primary/ECE schools to provide the ideal quality of Education, at 15,996 (USD 667) and 13,865 (USD 578), respectively.

At the time of the study, the government was allocating K600 (USD 24.33) per child per year for secondary education and K150 (USD 6.08) per child per year for primary education. By this threshold, a child in a secondary school receives about K200 (USD 8.11) per term, while a child in a primary school receives K50 (USD 2.03) per term. In comparison, the research findings have demonstrated that K2850 (USD 118.75) for secondary and K1360 (USD 56.67) for primary are the ideal costs for adequately financing a child's education. Based on these findings, the financing gap is significant. Although the education grant to schools is disbursed on the assumption of economies of scale, the financing gap remains significant. The study further established that the Ministry of Education categorises the school-based costs on the following: Teacher Education and Specialised Services, Curriculum and Material Development, Education Standards, Assessment and Evaluation, Co-Curricular Activities, Open and Distance Learning, Financial Management and Accounting, Procurement Management, Policy, Planning and Equity. The study was deliberate about the operational costs, which are quality drivers of quality learning.

At the household level, the findings showed an average unit cost of K13,164 (USD 548.5) per year for Secondary and K12,368 (USD 515.3) per year for Primary and ECE. By percentage, parents cover the largest share of unit costs, or per-child expenditure, which averages 94-96%, while the government spends 4-6%. The cost borne by parents and guardians covers the following for both girls and boys: uniform, transportation, food,

books, shoes, and selected other costs. In addition to the costs above, parents cover the cost of sanitary wear for girls. The gender cost comparisons were not highly significant for most items, except for girls' sanitary wear, whereas boys' uniforms were significantly higher. There was also variation in costs related to spatial considerations: while transport and food costs were low for learners from rural and remote areas, other household-based costs such as shoes, uniforms, and books were higher for the same learners.

Unit cost comparisons among countries show that components of Education for all, or free education, vary substantially. The desk review demonstrates that the provision of free education has a different context and coverage. While some countries have free

In primary education, the learners may pay for secondary education, both of which are free in Zambia in terms of school-based costs. Though the context of free education and the cost components paid by the government differ significantly from country to country, Zambia seems to be faring relatively well, especially with free education extending to the secondary level.

The study findings show a wide gap between the current financing of education and what is estimated to be ideal. There are budgetary consequences based on current and the ideal costs for providing the much-needed quality of education [current school costs for secondary K600 (USD 24.33) and ideal school-based costs should be K2850 (USD 118.75); For Primary and ECE, the current school-based cost is K150 (USD 6.08) and ideal school-based costs should be K1360 (USD 56.67)]. This picture clearly shows the existing financing gap in the current provision of

free education policy, which is five times higher than the current funding.

Based on these major findings, the study makes recommendations, among others, aimed at assisting the Zambian government in achieving the goals of providing the Free Education Policy. Top line recommendations, among others, include:

- Increase the current per-student government grant to schools to achieve quality education at all levels, including Early Childhood Education (ECE), Primary, and Secondary. This increase should be set at a level corresponding to spending between 4-6% of GDP on education or allocating at least 25-30% of the National budget to education. The government should consider scaling up school feeding programmes across all public schools. The government can utilise recommendations from an evaluation of the Home-Grown School Meals programme, which found that low-cost, nutritious school meals contribute to improved attendance. A school meal also helps improve attention in the classroom, as the learner is less likely to be hungry. The study also recommends greater support for implementing the school health and nutrition curriculum, as only a few schools have a feeding programme.
- The GRZ introduced the Constituency Development Fund (CDF) as a part of the devolution of power from the Central Government to the benefit of the citizens at a lower level. It is recommended that various district and community level stakeholders be sensitised towards the acquisition of funds from the CDF, which would caution the cost of education, especially those related to Unit Costs
- Communities and other stakeholders should be better engaged within the education planning and delivery processes, including through Parent Teacher Committees and other mechanisms, to help strengthen governance and accountability within the public education system. This can be done by advocating for the reintroduction of limited PTC fees so that PTCs are reenergised, increasing community ownership and responsibility through cost sharing in the provision of education. As much as possible, this may include a Public-Private Partnership to co-finance the provision of education, among other measures.
- Government should consider engaging NGOs or the private sector to support programming that targets adolescent health and provides much-needed sanitary infrastructure. Unmet needs for menstrual hygiene serve as a barrier to school attendance for female students, and household costs may also be reduced through the provision of supplies.

Looking towards the long term, this study proposes a costing framework that can be applied on a systematic basis that reconciles school and household-based costs (uniforms, supplies, transport, food and other expenses necessary to send their children to school) while factoring in institutional type and spatial considerations (Rural, urban and remoteness). Special weighted considerations were also taken into account to normalise the data, such as the use of the Consumer Price Index.

Preface

Assessing the cost of running schools in Zambia is a multifaceted endeavour with far- reaching implications for the country's educational landscape. This study, aimed at determining the cost of education per child in public schools, delved into the intricate dynamics of education financing and the impact of various institutional and spatial factors on resource allocation. Conducted by Hotline Consulting Firm and generously funded by the British Council, this research endeavours to provide critical insights to guide the Zambian government in enhancing the efficiency and effectiveness of its public education system.

The context in which this study unfolds is characterised by diverse financing models, including tax funding, cost sharing, and private funding, each with its unique implications on the cost of educating a child. Moreover, the introduction of free education policies, aligned with the Education for All goals, has significantly influenced resource allocation, necessitating a comprehensive examination of unit financing costs across different levels of education.

Unit cost considerations are important, taking into account both school-based and household-based costs. The distinction between Cost of Attendance (COA) and Net Cost provides a differentiated understanding of the financial burden borne by learners and their families. Despite the strides made towards free education, the Net Cost reveals underlying expenses that parents still incur, underscoring the need for holistic policy reviews to meet the needs of learners and parents fully. Furthermore, spatial considerations further complicate the cost dynamics, with rural and urban schools facing distinct challenges in resource allocation and infrastructure development. Quality education standards, essential for achieving educational equity, necessitate substantial investments in teacher training, infrastructure, and instructional materials, particularly in underserved areas.

The methodology employed in this study encompasses a needs assessment and an infrastructure investment review to capture the specific requirements of schools across various regions. It addresses the diverse needs of respondents, focusing on gender and learners with disabilities, to foster more inclusive education and provide a holistic understanding of the factors influencing the cost of education per child.

As the team navigates the intricacies of Zambia's education system, we hope this study catalyses informed decision-making, paving the way for equitable access to quality education for all children, regardless of their socio-economic background. We extend our profound gratitude to the British Council for their unwavering support and to all those who contributed to the realisation of this endeavour.

Acknowledgements

Hotline Consulting Firm wishes to extend its sincere gratitude to the British Council for granting permission to conduct this study. British Council's invaluable guidance, support and unwavering commitment throughout the process of conducting this study are highly recognised and appreciated. The initiation and funding of the study made it possible to determine the cost of education per child in Public Schools. The study further provided Hotline an opportunity to delve into crucial insights that will undoubtedly inform policy decisions for years to come.

Special appreciation is also owed to the Hotline Consulting Firm team, including data collectors, for their meticulous execution of the research, diligently overseeing every aspect of the study to ensure its accuracy and reliability. It is through their expertise and dedication that this project reached its meaningful fruition.

We also extend our heartfelt thanks to the Government of the Republic of Zambia, particularly the Ministry of Education, and its cooperating partners, who are the primary users of these study findings. Their collaboration and engagement throughout the research process have been invaluable, emphasising their commitment to improving educational outcomes for all. Furthermore, we express our gratitude to the dedicated team of researchers, including data collectors, who tirelessly gathered information, often under challenging circumstances, to ensure the comprehensive nature of this study. Their diligence and professionalism are deeply appreciated.

We are equally grateful to all the respondents, at both the household and institutional levels, whose cooperation and willingness to share their insights were instrumental in shaping the findings of this study. Their contributions have been indispensable in painting a holistic picture of the educational landscape, particularly on the cost of education per child in Zambia.

Last but not least, we convey our profound appreciation to the British Council for entrusting Hotline Consulting Firm with this significant project. It has been an honour and a privilege to collaborate with such esteemed partners to advance education and empower communities.

CONGO
Kikwit
Kananga
Solwezi
Ndola
ZAMBIA
Lusaka
Mongu
Livingstone
BOTSWANA

Chapter 1:

Introduction And Background

The Zambian education system faces significant challenges, including low enrolment, high dropout rates, and limited access to quality education. Zambia faces significant challenges in its education system, including low progression rates, especially at the secondary level, high dropout rates, and limited access to quality education. To counteract these constraints, the Zambian government introduced the Free Education Policy in 2015, which removed tuition fees for learners in the Zambian public education system. The Policy was put in place to increase educational accessibility and reduce barriers to children receiving quality primary and secondary education, regardless of their socio-economic background. This was also a clear step towards meeting Zambia's commitment to achieving the United Nations' Sustainable Development Goal (SDG) 4, which focuses on inclusive and equitable quality education for all. The government extended the policy of free education in 2022 to include secondary school education, increasing educational accessibility and reducing barriers for children as they progress through their education in later years.

However, the true cost of education is not well-documented in Zambia. It was against this background that the British Council, under its Empowerment for Development of Girls Education (EDGE) project in Zambia, set out to conduct a costing study to establish the cost of educating a child in a public school. The costing exercise was conducted to assist the Government of the Republic of Zambia (GRZ) in determining the cost of educating a child within the public school system. This report presents the findings of the study on the costing exercise to establish the cost of educating a child in a public school in Zambia.

Context

The Free Education Policy commitment in Zambia is in line with the United Nations Education for All goals, which advocate that no child should be excluded from education on account of cost. The Free Education Policy states that education is free from early childhood to secondary school level in all government-run schools. The Zambian Ministry of Education introduced the Free Primary Policy in 2002 under the Mwanawasa Government. This policy was only made free for Grades 1-7. In 2022, the New Deal government under President Hakainde Hichilema extended the Free Education Policy to cover ECE through Grade 12. The 2022 Free Education Policy has led to an increase in enrolment rates and improved access to education, particularly for disadvantaged children.

Since the introduction of the Free Education policy from ECE to Secondary level in 2022, the number of learners in GRZ public schools has increased from approximately

4.3 million in 2021
to
6.5 million

(Education Sector Joint Annual Review, 2023).

In terms of funding, the government allocates resources annually in the national budget to fund the Free Education Policy, covering teacher salaries, infrastructure development, and learning materials. International donor organisations and development partners also contribute to support the policy's implementation. The allocation of

resources to the education sector was K18.1 billion in 2022, accounting for 10.4% of the total budget, making it the largest share.

education budget in the last five years. In 2023, the allocation was increased by an additional 3.5 per cent to K23.2 billion.

While the Free Education Policy has made significant strides in improving access to education, this budget remains inadequate to cover the total cost of education for all of Zambia's learners. Additional infrastructure expansion, hiring of additional teachers (noting that an additional 30,000 and 4,500 teachers were recruited in 2022 and 2023, respectively), teacher capacity building, and investments that maintain the quality of education and address regional disparities are required. Advocacy is ongoing to increase the annual budget allocation to an appropriate level. A clear understanding of the total cost of high-quality service delivery across the education sector is required to inform evidence-based advocacy efforts and to provide a strong investment case. As such, a clear assessment of the cost of operating all of Zambia's public schools is a crucial task to guide GRZ decision-making as it seeks to improve the efficiency and effectiveness of the country's public education system.

The Government currently utilises three models in financing education, including tax funding, where local taxes are channelled into the education sector to support the provision of public education services; cost sharing, where a portion of the institution's costs are born by government and a portion of costs are covered through student fees; and the economic (private) model, where all costs to operate the school are financed by school fees and other associated deposits/costs to the individual.

Each of these models has implications for the cost of educating a child. The introduction of free education to cover individual learners' costs in public schools from Early Childhood, Primary, and Secondary Education incurs unit financing costs that vary by level of education. Free Education is a deliberate policy that works to ensure equitable access to education for all by removing the financial burden of tuition and PTA fees from parents and guardians, thereby improving access to education for all eligible school-going children.

Free education is delivered through Government grants provided to schools; total grant values are based on the number of learners within an institution and do not take into account differences in costs across urban, rural and remote areas.

In general, two types of fees exist. Firstly, direct fees or costs such as tuition fees, examination fees and so on, which are spent directly on education. The learner no longer bears these fees, as they are now paid by the government (MoE 2023). Secondly, indirect fees or costs that support access to education but are not directly related to a learner's education, such as transportation, food, and other expenses. Parents and guardians largely cover these.

Statement of the Problem and Rationale of the study

The Free Education Policy is a GRZ initiative aimed at expanding access to education and reducing barriers to education for children in the country. Zambia faces significant challenges in its education system, including low progression rates, especially at the secondary level, high dropout rates, and limited access to quality education (Zambia Ed Policy 1996, Mulenga 2018, Masaiti 2018). The Free Education Policy was introduced in response to these challenges in 2015 and to fulfil Zambia's commitment to achieving the United Nations' Sustainable Development Goal 4, which focuses on inclusive and equitable quality education for all. The primary objective of the Free Education Policy is to eliminate tuition fees and other direct costs associated with basic education in government-run schools. The policy aims to ensure that every child has access to quality primary and secondary education, regardless of their socio-economic background.

As a result of the Free Education Policy, parents and guardians do not pay school fees at all public schools in Zambia, from early childhood through primary and up to secondary school levels. GRZ pays tuition fees through a compensatory grant for all government schools that offer early childhood and secondary education. The compensatory grant equals the amount previously collected by schools as user fees.

However, these costs do not effectively capture the real cost of providing education under the Free Education Policy, as parents and guardians continue to pay other school-related expenses out of household budgets, including uniforms, transportation, food, and other costs. There is therefore a need to understand the full cost of providing education to each child in Zambia's public school system. This consultancy was initiated to fill this critical information gap.

In calculating unit costs of education provision per child in primary and secondary public and community schools, the research team reviewed the direct and indirect costs of attending school. It subtracted these costs from the government grant. Other factors which were considered are:

1. The total number of learners enrolled across different levels of the public education system in a particular year. This enabled the consultants to understand exactly how much is required per school in real terms per year, based on the school population, to effectively run the school, and how the unit cost may vary depending on the learner population.
2. The expected annual expenditure per learner needed, taking into account the differently abled learners' costs and requirements, and the cost of ensuring inclusivity and equity of education provision against what the government disburses annually to schools to have the desired education outcome or output.
3. The cost of accessing school versus the quality of education provided,

including pedagogical practices, Teaching and Learning Materials (TLM).

Many of these components are not well understood, and their associated costs are unavailable. This study sought to fill this gap by assessing the cost drivers for running public schools in Zambia, drawing on both local and international data.

coming from other countries with a similar context. This study is envisioned as a tool to assist government decision-making on the provision of education by determining a reasonable cost-per-child measure and then developing a costing framework that informs equitable financing for schools in Zambia.

Objectives and Deliverables

1. The overall objective of the study is to support the GRZ to develop a costing framework that reconciles school and household-based costs of educating children through the public school system while factoring in institutional type and spatial considerations of rural, urban and remoteness. The costing will enable the GRZ to undertake equitable financing for schools that better support the effective implementation of the EFA policy.

2. The following were set out as the sub-objectives;

- Determining the real/true cost of educating a child in Zambia's public schools;
- Assessing the cost differential of running schools, factoring in institutional type and spatial considerations (Rural, urban and remoteness);
- Determining the school-level investment required to provide a quality education under the EFA policy;
- Understanding the cost of sending children to school[1] for families (uniforms, supplies, transport, food, books, bags, shoes and other expenses necessary to send children to school) under the EFA policy;
- Comparison of cost per child expenditures in public, community and church-run or grant-aided institutions;
- Conducting an international cost comparison of spending per child, especially with countries implementing the free education policy, to inform government policy;
- Informing the direction local communities and the private sector can play in education financing to ensure that cost issues are addressed without penalising vulnerable people, especially girls and boys;
- Determining a reasonable cost of education per child measure given the Zambian context;

1 The Steep Price of Education in Africa

- Developing a costing framework that reconciles school and household-based costs of educating children while factoring in institutional type and spatial considerations (Rural, urban and remoteness); and
- Supporting the GRZ to use the costing framework to inform equitable financing for schools

Deliverables for the assignment included:

1. Literature review of the key references shared under section seven (7);
2. Inception report outlining understanding of the request and the approach that will be used to execute the task. This includes sharing the sampling design and scope of the investigation.
3. Entrance meeting engaging the GRZ (key line ministries) to familiarise and involve them in the data gathering efforts;
4. Estimate of the financing required to provide a quality education under the EFA policy;
5. Costing framework that reconciles school and household-based costs (uniforms, supplies, transport, food and other expenses necessary to send their children to school) while factoring in institutional type and spatial considerations (Rural, urban and remoteness);
6. Presentation of emerging findings to the EDGE project and FCDO;
7. Validation meeting involving the GRZ (key line ministries);
8. Session for the GRZ to familiarise with and use the costing framework to inform equitable financing for schools;
9. Final report and presentation; and
10. Main consultancy report that clearly represents the findings across the objectives outlined.

Expected Outputs

The following were the summarised outputs of the study;

1. A costing framework that reconciles school and household-based costs of educating children while factoring in institutional type and spatial considerations (Rural, urban and remoteness). The GRZ will use the costing framework to inform equitable school financing.
2. Presentation of the findings of the costing exercise to the GRZ, the Foreign, Commonwealth & Development Office (FCDO) and cooperating partners with a view to identifying opportunities to support the EFA policy better using a sector-wide approach.
3. Recommendations of the role local communities and the private sector can play in education financing to ensure that cost issues are addressed without penalising

vulnerable people, especially marginalised and vulnerable girls and boys.

Overview of Approach

Specific, targeted analyses were required to understand the above factors better and ultimately generate a robust costing of Zambia's educational model. These include:

Needs Assessment: A needs assessment was conducted to determine the specific requirements of schools in various regions. This included factors such as student-teacher

ratios, infrastructure condition, access to clean water and sanitation, and the availability of educational materials.

Cost Analysis: The Cost of Attendance (COA) and the Net Cost must also be considered when determining the true cost of delivering education (Khan Academy 2023). The COA is the total estimated cost of attending school, including all direct and indirect costs such as tuition, examination fees, classroom space, boarding facilities, books, teacher salaries, other support staff on government payroll, and other expenses. The Net Cost is the amount generally paid by learners, such as transport to school, food while at school, uniforms and other items. The Net Cost is calculated by subtracting financial aid, such as grants and scholarships, from the COA. The COA is the highest possible price when considering the true cost of education, whereas the Net Cost is the true cost the learner is expected to pay towards their education. Based on the concepts of Cost of Attendance and Net Cost, it is evident that what is most considered as free education is actually not free completely because there are additional costs (Net Cost) that parents and guardians must pay for their children to go to school. Both COA and Net Cost will be considered throughout this analysis.

Infrastructure Investment Review: Analyse the infrastructure gaps and investment required to provide a conducive learning environment. This includes classroom construction, sanitation facilities, and access to technology for modern pedagogical practices.

This costing exercise considered several key factors as outlined below:

Institutional Type: Educational institutions in Zambia include public, private, and community schools. Depending on the institutional type, each school has varying cost structures. Public schools rely heavily on government grants, while private schools are funded through tuition fees collected from learners. In most cases, Community schools tend to operate with limited resources and depend mainly on community contributions. In order to assess the cost differential, the consultants sought to analyse the funding sources, teacher salaries, infrastructure maintenance, and curriculum requirements specific to each type.

Spatial Considerations: Spatial disparities are a significant challenge in Zambia's education system. Schools in urban areas tend to have better infrastructure and access to resources than those in rural or remote areas. The consultants considered the cost implications of transportation, building

and maintaining schools in remote locations, and providing equal educational opportunities across regions.

Quality Education Standards: Quality education under the EFA Policy necessitates adequate investment in teacher training, instructional materials, infrastructure, and technology. The school-level investment requirements for achieving these standards and the associated costs were assessed using a combination of qualitative and quantitative methods.

Further, this study also considered the diverse needs of respondents with a particular focus on gender and learners with disabilities. The research acknowledges the importance of

Inclusive education and endeavours to provide a holistic understanding of the financial, social, and cultural factors that influence the cost of education per child.

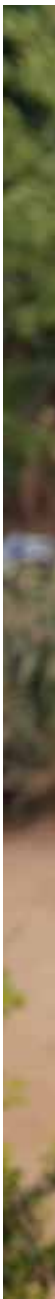
Usage of the Framework by the GRZ

A costing framework is a scheme used by institutions to analyse the cost of goods and services. It helps institutions understand how much revenue a particular product or service (e.g., education) needs to break even. By understanding the costs associated with their products or services, institutions can make more informed pricing decisions and ensure profitability. In this context, the Ministry of Education and other stakeholders will be able to understand and make more fully informed decisions regarding the cost of educating children in public schools in Zambia.

With the aid of this framework, the Zambian government, through the Ministry of Education and other stakeholders, will be able to generate an accurate estimate of education costs. This framework will provide insights into where the bulk of the costs will be incurred and what cost-saving measures can be put in place. In addition to providing an accurate cost estimate, the framework may also help assess the financial viability of the schools in providing the desired quality of education.

This costing framework is accompanied by concise guidelines on how to apply the framework. These guidelines will help education stakeholders to better understand the framework, as they are used for planning and budgeting by the Ministry of Education Planning Directorate. The consultants will also provide a capacity-building component for the relevant officers within the Ministry of Education and equip them with the knowledge on how to utilise the framework as they develop their annual work plans and budgets, and work to make school financing more adequate and equitable. Capacity building should also be carried out at the lowest level/ closest to the institution to support decentralised planning and ownership of plans and budgets, with an eye on value for money and sustainability.

It should also be noted that the development of the costing framework is not a standalone or an end in and of itself. It should incorporate governance



systems in place, issues affecting boys and girls while in school. This may include school health and hygiene, feeding programs, infrastructure and learning environment, teaching and learning materials for all learners, including materials for differently abled learners and other barriers that inhibit them from having access to education, issues related to quality of education provided, including pedagogical practices, time on task, teacher-pupil ratio and other hidden costs. measures to integrate its accurate application and ongoing use as critical guidelines for the core line Ministries to develop their annual work plans and budgets year on year, also including a gender lens and considerations for regional variations.

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Chapter 2:

Literature Review & Analysis Across Countries

This literature review provides a foundation for the GRZ's efforts to navigate the intricate landscape of education costing and to promote more effective and equitable resource allocation.

Education is a fundamental right, and ensuring access to quality education for all is a global imperative. Education is associated with improved macroeconomic performance, in the form of higher growth rates, through higher levels of productivity and per capita income at the country level (Lewin and Caillods, cited in Onsomu, 2006). Bray (2002), on the other hand, notes that levels of education financing, in both the public and private sectors, are largely determined by political, social, and economic factors. Governments worldwide strive to develop effective costing frameworks to finance education equitably, although challenges persist.

This literature review examines the historical context and challenges of costing education, focusing on the lack of readily available cost-per-child metrics in most countries, including Zambia. Countries such as Kenya and Malawi have attempted to define the unit cost per learner using school-based variables and serve as good models for learning (Ngetich et al., 2014; World Bank, 2010). The study aims to provide insights for supporting the GRZ in developing a comprehensive costing framework aligned with the Free Education Policy.

Historically, global initiatives such as the Education for All (EFA) movement and the United Nations' SDG 4 underscore the importance of quality education. Despite these efforts, challenges in costing education persist globally. Research by UNESCO (2019) indicates a lack of standardised cost-per-child metrics, hindering comprehensive financial

planning and equitable resource allocation.

Studies (Hanushek & Woessmann, 2015; World Bank, 2018) highlight the complexity of education costing due to diverse contextual factors. Institutional variations, spatial considerations, and differing socioeconomic contexts contribute to the absence of a universal cost-per-child measure. The literature emphasises the need for tailored costing frameworks that account for local nuances and challenges.

In examining regional perspectives, challenges in costing education emerge with unique characteristics in each region. Research by the African Union (AU, 2017) emphasises the need for region-specific costing frameworks, recognising the diverse educational landscapes across the continent. Regional disparities in infrastructure, teacher salaries, and accessibility compound the complexities of cost determination.

Within Southern Africa, studies (SADC, 2016) highlight the impact of rural-urban differentials on education costs. Remote areas often face higher transportation and infrastructure costs, posing challenges for equitable financing. These regional insights underscore the need for GRZ to consider spatial factors when developing its costing framework. It is worth noting that, as countries such as Malawi and Kenya.

When determining the unit cost per student at the primary and secondary levels, the cost varies across levels.

Trends in Education in Zambia

The Free Education Policy was implemented in 2015 for primary education. Following the 2021 announcement that the policy was being extended to cover secondary education in GRZ public schools, the number of learners increased from an estimated 4.3 million in 2021 to 6.5 million in 2023 (Education Sector Joint Annual Review, 2023).

A substantial disparity exists between the numbers of primary and secondary schools, with 9 primary schools for every 1 secondary school (EMIS 2020). Enrolment patterns reveal significant declines after Grade 7 and Grade 9 examinations, underscoring the need for sustained investments to curtail dropouts and address the limited availability of schools offering higher grades (MoE 2023). There is a planned expansion of secondary schools, with 120 to be constructed in 2023 to help address the demand for education.

Primary education receives more than half of the education budget due to its larger enrolment. In 2022, primary education accounted for 56 per cent of the funds allocated, reflecting its pivotal role in shaping the educational landscape (Zambia Budget Analysis 2023). Secondary education receives 28 per cent of the budget, tertiary education 8 per cent, and early childhood education (ECE) less than 1 per cent.

The Zambian Education Legal and Policy Framework

In recent years, GRZ has continued to uphold the principle of equal rights to educational opportunity regardless of a person's status (Ministry of Education, 1996). This means that every individual child, regardless of personal circumstances or capacity, has a right of access to, and participation in, the education system (MoE, 1996). However, since independence, the nation has had three main changes to the legal framework, from the 1966 Education Act to the 2011 Education Act, which was later updated as the Higher Education Act of 2013 to address needs in the education sector (MoGE, 2019). Thus, the progress in improving the legal and regulatory environment has been slow. As a result, the current education legal framework is not up to date with other international instruments domesticated by Zambia, including the Convention on the Rights of the Child (CRC) and Article 13 of the International Covenant on Economic, Social and Cultural Rights, which ensures the right to free education at primary education and progressive introduction of it at secondary and higher education as the right to education. [1]

The Free Education Policy was introduced in 2015 for primary education and revised in 2021 to include secondary education. It is understood to eliminate tuition fees and other direct costs associated with basic education in government-run schools. These policy pronouncements were aimed at ensuring that every child has access to quality primary and secondary education, regardless of their socio-economic background. Under the updated 2022 Free Education policy, tuition fees are abolished in government schools for all grades 1 to 12, covering both primary and secondary education, including ECE.

However, while government policy initiatives have advanced, the legal provisions have lagged (UNESCO, 2016). This has contributed to difficulties within the education system as it has worked to provide organised learning. Similarly, while the Higher Education Act of 2013 gives reference to Free Basic Education, the policy has reinstated the old structure of primary and secondary education (MoGE, 2019).

Another mismatch within the legal framework is the requirement that parents and guardians ensure that children are enrolled in and attend school. While the law does not specifically prescribe compulsory basic education, it does require compulsory school attendance. This requirement includes children enrolled in school and those out of school. Implementation challenges persist as it is difficult to track attendance and, importantly, to provide access to education for all potential learners.

As noted by the MoGE (ESSP 2018) in the "Education and Skills Sector Plan 2017-2021", a progressive legal and regulatory environment is essential for a rights-

1 https://en.wikipedia.org/wiki/International_Covenant_on_Economic,_Social_and_Cultural_Rights

based approach to education, as it ensures that the system provides opportunities for all citizens to access quality education (MoGE, 2018).

Financing for the Education Sector in Zambia

Financing for the Education Sector in Zambia. While education has consistently been among the top three expenditure allocations by function, the share of the budget allocated to education declined from 2016 (Masaiti, 2023; UNICEF, 2023; MOF, 2023). As a share of the total budget, the allocation to education has increased by 17 per cent, from K8.4 billion in 2022 to K9.9 billion in 2023, or 13.9% of the total budget. This allocation to education is still below the recommended global commitments on percentage allocation to the sector; under the Education 2030 Incheon Declaration and Framework for Action, a global plan agreed by countries in 2015 for the implementation of SDG 4, countries pledged to spend 4-6 per cent of GDP or 15-20 per cent of the total budget on education.

Recent studies (Lewin, 2022) have shown that if a country allocates 20% of public expenditure to education, and public expenditure is 20% of GDP, then education receives only 4% of GDP (20% of 20%). The average LIC currently allocates less than 15% of public expenditure to education and no more than 15% of GDP to total public expenditure. Reaching 6% of GDP would require at least 30% of public expenditure if total government spending were increased to 20% of GDP (30% of 20%). The necessary increases are implausible and are very unlikely to be achieved by 2030.

The literature review also indicated that the decision to abolish school fees to promote access to education has increased reliance on government grants to cover non-wage expenditures and introduced a financing gap that necessitates significant government intervention (UNICEF 2023). The major sources of funding for the education sector are Government budget allocations, grants from international organisations, and, to some extent, Cooperating Partners (CPs). This review showed that, over the

Over the past ten years, there has been a reduction in the external donor support to the Ministry of Education. Given the shift to free education, the contribution from local communities to schools has also been reduced, resulting in a financing gap that will have to be met by the government itself, hence requiring timely and regular disbursements of grants to schools.

The allocation to education between 2015 and 2023, in terms of GDP, and percentage to education is as follows:

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023
GDP %	5	4.4	4.6	4.2	4.4	4.0	3.8	3.9	4.4
Per (%)	20.2	17.2	16.5	16.1	15.3	12.4	11.5	10.4	13.9

Table 2.1: Zambia % budget allocation to education, 2015-2023

Additionally, the expenditure on education is dominated by personal emoluments related to teacher salaries and other allowances. This is followed by infrastructure development and maintenance, educational materials and resources, teacher training and professional development, administrative costs and (now) aspirations on technology integration.

The primary school allocation in the 2023 budget, for example, shows that the larger portion of this budget, amounting to K7,280,849,208, representing 91% of the sub-sector budget, went towards Personnel Emoluments. K10,471,064 went towards the use of goods and services for general operations, while K310,241,721 was allocated to school grants. Community school support was allocated K2,939,834, the school feeding programme was allocated K38,760,880, and requisites for free primary education were allocated 187,804,977, leaving infrastructure with K130,380,000 (ZANEC 2022).

In 2023, the allocation increased by an additional 3.5 per cent to K23.2 billion, although this period also saw a decrease in the value of the kwacha. Within this, the budget allocation to secondary education saw a larger increase than other budget components, from K592.2 million.

Finally, the literature also reiterated the importance of timely and consistent disbursement of government grants to schools to ensure that schools maintain resources to operate across weeks and months (Zambia Budget Brief 2023)—challenges in timely disbursement have been reported across many service delivery sectors in Zambia.

Review of Education Costing Across Countries

When looking at the unit costs of education in Zambia, it is also critical to conduct a robust review of the programmes and costings carried out in other countries with similar characteristics. This allows for benchmarking, identification of good practice, and the drawing of lessons learned. This review of global literature examined various countries, primarily across the African Region, that are on track to achieve Universal Primary Education (UPE). Many of these countries are now seeking innovative strategies and financing options to expand primary and secondary education, consistent with national human capital development goals. However, fiscal constraints prevent many, especially low-income countries, from relying solely on government revenue to finance desired educational expansion. In this section, we examine the unit cost of education in other countries that offer education systems similar to those in Zambia.

Education Financing Trends Across Countries

Current research from the Education Finance Watch 2022 report shows that in low- and lower-middle-income countries, households cover a much larger share of the cost of their children's education than

in high-income countries. Household and other private spending in African countries accounted for nearly 40 per cent of education spending, while governments covered 60 per cent. Meanwhile, school enrolment and completion in this region are the lowest in the world. In contrast, in high-income countries, where primary and secondary school enrolment and completion are highest, households contribute nearly six times as much as governments to education. Generally, as governments spend more on education, more children complete their schooling.

In 2021, the Institute for Health Metrics and Evaluation (IHME) evaluated data from household surveys, including those conducted in nineteen African countries from 2010 to 2019. These analyses showed that households must pay for more than just school tuition and fees to provide their children with an education. The cost of supplies, uniforms, transportation, and other fees is also the responsibility of families. In fact, nearly one-half of household education spending across the surveyed nineteen African countries goes to costs outside of school tuition and fees.

Lee and Ronald (2003) asserted that the cost of education is borne not only by the government but also by parents (or caregivers/guardians), whether indirectly through taxes or directly through personal expenditure to support day-to-day schooling activities. Parents have to incur several costs to educate their children. These include school fees, school uniform, books and equipment, pocket money for meals, school trips and other charges. While many of these are quite standard, as they are determined by schools and usually supported by Parent Teacher Associations and the government, some expenditures may vary widely among students, such as extra reading materials and tuition. Richer parents tend to spend more on their children's tuition and other educational materials such as books and computers.

According to Lee and Ronald (2003), private education consumption includes tuition, books and fees, school supplies for all school levels, including pre-school and tutoring expenses. According to Kiage, Simatwa, and Ayodo (2014), boarding fees vary by school category. They further established that boarding fees in girls' secondary schools vary from one category of school to another, and that the number of children in households and in schools mostly increases the household's education costs.

Oumer (2008) reiterates the same view that although many African countries have decided to abolish school fees, challenges remain, and there are also consequences and hidden costs (the persistence of some kind of fees and other private costs of schooling) that remain a worldwide phenomenon, even when some African countries have officially abolished them.

abolished fees. Oumer remarks that the abolition of school fees is not a magic word but a very complex process with no quick-fix solutions. He argues that abolishing school fees is not just about tuition fees, which do not necessarily constitute the bulk of fees. It must take into consideration a wide range of costs. This means any direct and indirect costs or charges (such as tuition fees, costs of textbooks, supplies and uniforms, PTA contributions, costs related to sports and other school activities and transportation costs), as well as opportunity costs and other burdens on low-income families.

Literature shows that the Free Education

policies are implemented differently across countries. In some countries, the focus is on free primary education only, where learners pay for secondary education. For instance, in Kenya, education is compulsory and free for primary school (eight years). Secondary school (four years) costs upwards of $400 a year (per capita GDP is $1,816), and slightly more than half the appropriate age cohort is enrolled.

Comparing Unit Costings Across Countries

This section looks at the different countries that offer free education and profiles the costs covered in their free education policy framework. This information will help in understanding how Zambia compares in the cost of educating a Child in a Public School, which might help generate a sustainable unit cost framework.

Adhering to international, regional, and Sub-regional best practices and documentation standards, a comprehensive methodology matrix was applied for this vital stage of learning. Identification and documentation of free education policies, programmes, and implementation practices, with a focus on the key entry point for gathering relevant information. The review of existing literature on the implementation of the Free Education policies within the region was the first critical step, focusing on countries such as Kenya, Malawi, Tanzania, Zimbabwe and others with similarities to Zambia and similar periods of implementation. Reports, journals, and other publications were reviewed to compare spending per child and provide recommendations to the Ministry of Education in Zambia. Data collection guidelines were set out for the literature desk review, and an analysis scorecard tool will also be designed based on good practice to suit the various school contexts, so the cost-comparative documentation exercise remains relevant.

Each country has different household costs associated with public schooling. UNESCO reports, “In certain settings, all in-school costs are covered by the government, and the out- of-school costs, transportation, uniforms, etc., are so small that analysts do not think they deserve much attention.” In other contexts—including public school systems—household and community expenses are so high that they account for more than half of the total. Other nations mentioned in the same report included Myanmar, Togo, Uganda, and Vietnam, where households covered more than half of total expenditure on elementary public education (UNESCO, 2018).

It is worth noting that the socioeconomic characteristics of students and the conditions at the school also determine the cost of provision of education, assuming similar outcomes are

desired. Increasing the capitation amount for schools that start from worse conditions, face teacher shortages, or serve more disadvantaged students may help reduce gaps and inequities in outcomes. This may be especially relevant in cases where parental contributions toward accessory materials are limited or may prevent students from attending school. Evidence shows that children from poorer backgrounds need

additional support to achieve the same results as better-off students. As such, it is suggested that higher capitation grants may be required to increase funding for disadvantaged schools, particularly those in rural and/or remote areas.

Using countries within the African Region as comparison points is also critical, as they may share similar contexts and historical experiences. On table 2.2 showing the Free Education cost differentials amongst some African countries at the primary school level

Primary School

Country	Year	Tuition-free	Other Fees Waived	Notes
The Gambia	2013	Y	N	
Ghana	2005	Y	N	Capitation grants were in arrears for two years, and the parliament recently approved the payment of GH¢20 million to settle this. Overall, while the introduction of the grant scheme has led to increased enrolment rates, this has not necessarily translated to significant increases in retention/graduation rates. There have been documented issues related to increased enrolment without a commensurate expansion of educational resources and infrastructure. There has been a notable rise in low-cost private schools, as they are perceived as better than free public schools.
Kenya	2003	Y	Some	Seemingly, textbooks are covered. However, there have been documented issues with classroom overcrowding, insufficient books for students, and other problems. As in Ghana, there has been a rise in low-cost private schools, as they are perceived as better than free public schools.
Madagascar	1960	Y	N	
Malawi	1994	Y	Some	Families do not have to buy school uniforms or textbooks.
Mauritius	1976	Y	N	Hard to find information, but given an advertisement found for school uniforms and lunch boxes, at least those areas are not covered.
Namibia	2013	Y	Some	Textbooks are covered; uniforms are not.
Rwanda	2003	Y	N	
Sierra Leone	2007	Y	N	Fees for teaching/learning materials and examination fees are subsidised. Students must pass a national exam at the grade level 6 to be eligible to attend secondary school. The government provides a 12 – 18 USD subsidy per student per year to schools.
South Africa	1996	Some	N	Elimination of school fees (tuition) for the poorest schools and students.
South Sudan	2012	Y		It seems that other fees are not covered, but it is unclear. Can only find repeated mentions of “free” education, but no breakdown of what is covered.
Togo		Y		Free primary education was part of the 1992 constitution, but not enacted until the 2007/2008 school year. It seems that textbooks are covered.
Uganda	1997	Y	Some	Textbooks are covered.
Zambia	2002	Y	N	

Table 2.2: Free Education cost differentials amongst some African countries at the primary school level.

Here is the current picture and how Zambia compares with other countries in providing free secondary education.

Country	Year	Tuition-free	Other Fees Waived	Notes
The Gambia	2015	Y	N	Carried out through the "school improvement grant" to schools. Aim to transition to digital materials to cut down on costs and ensure materials remain up to date.
Ghana	2017	Y	Most	No user cost (registration, tuition, food, uniforms, textbooks, housing). Still charge PTA fees.
Kenya	2008	Y	Some	No fees for learning materials, exams, or activities. Must pay "caution money (for new entrants)" and development fees (capped at 2500 Ksh per year), as well as food.
Madagascar	2020	Y	N	
Malawi	2019	Y	Some	No tuition fees, general purpose fund fees, or book fees. Still have fees for exams, food, and housing.
Mauritius	1976	Y	N	Hard to find information, but given an advertisement found for school uniforms and lunch boxes, at least those areas are not covered.
Namibia	2016	Y	Some	Seems to cover book fees. They provide N$ 300 per secondary student per year. There are government hostels which also provide food, though it is unclear if these are free or subsidised.
Rwanda	2012	Y	N	Does not seem to cover uniforms, books, and other fees.
Sierra Leone	2019	Y	N	Fees for teaching/learning materials and examination fees are subsidised. Students must pass a national exam in grade 6 to be eligible to attend secondary school. The government provides a 12 – 18 USD subsidy per student per year to schools.
South Africa	2007	Some	N	Elimination of fees began in the poorest areas in 2007 and expanded to progressively less poor areas until 2012; wealthier areas still charge fees.
South Sudan	2023	Y		It seems that other fees are not covered, but it is unclear. Can only find repeated mentions of "free" education, but no breakdown of what is covered.
Togo	2021	Y		Unclear, can only find references to paying all "school fees".
Uganda	2012	Y*	N	Government grants of 52 USD per student per year cover tuition and related costs, but not other expenses (such as uniforms and food). Students must have passed their exams to be eligible (only 42,000 of 228,513 were eligible for the program).
Zambia	2022	Y	N*	No user fees, exam fees, or PTA dues, boarding fees capped at 1000 kwacha per year, "vulnerable" learners do not have to pay boarding fees, and the government pays compensatory fees grant to schools equal to what they would have collected through fees.

Table 2.3: Free Education cost differentials amongst some African countries at Secondary Education

In addition to a general comparison, a more detailed review of selected countries is also useful for understanding the unit cost of educating a child.

Malawi

In Malawi, the Government removed tuition fees, textbook fees and the general-purpose fund (GPF) for secondary schools in 2018. Despite the fees being waived, the families continued to contribute to the financing of their children's education services by paying for uniforms, writing books, and other materials. A review of expenditure in Malawi compared education spending with that of neighbouring countries; the data are shown in the table below.

Education Spending in Malawi compared to Neighbours, Average 2017-19 Country Per capita (US$) * % of TGE % of GDP

Country	Per capita (US$) *%	% of TGE	% of GDP
Malawi	52	22.7	6.6
Mozambique	66	17.2	5.8
Tanzania	111	14.9	3.6
Zimbabwe	116	26.5	2.7
Zambia	175	15.9	4.2
ESAR	240	16.5	4.5

Source: UNESCO Institute of Statistics (UIS) (2020) and Government Spending Watch (2020) * in per capita constant 2011 US$

Table 2.4: Education Spending in Malawi, 2017-2019

The data show that Malawi spends less on education than other SADC countries on a per-student basis, but less as a percentage of GDP or Total Government Expenditure (TGE) (UNESCO 2022). The latest available data from the UNESCO Institute for Statistics (UIS) show that average per-student spending in Malawi is about US$52. However, when viewed in relation to Total Government Expenditure and GDP, education spending in Malawi is above the ESAR average.

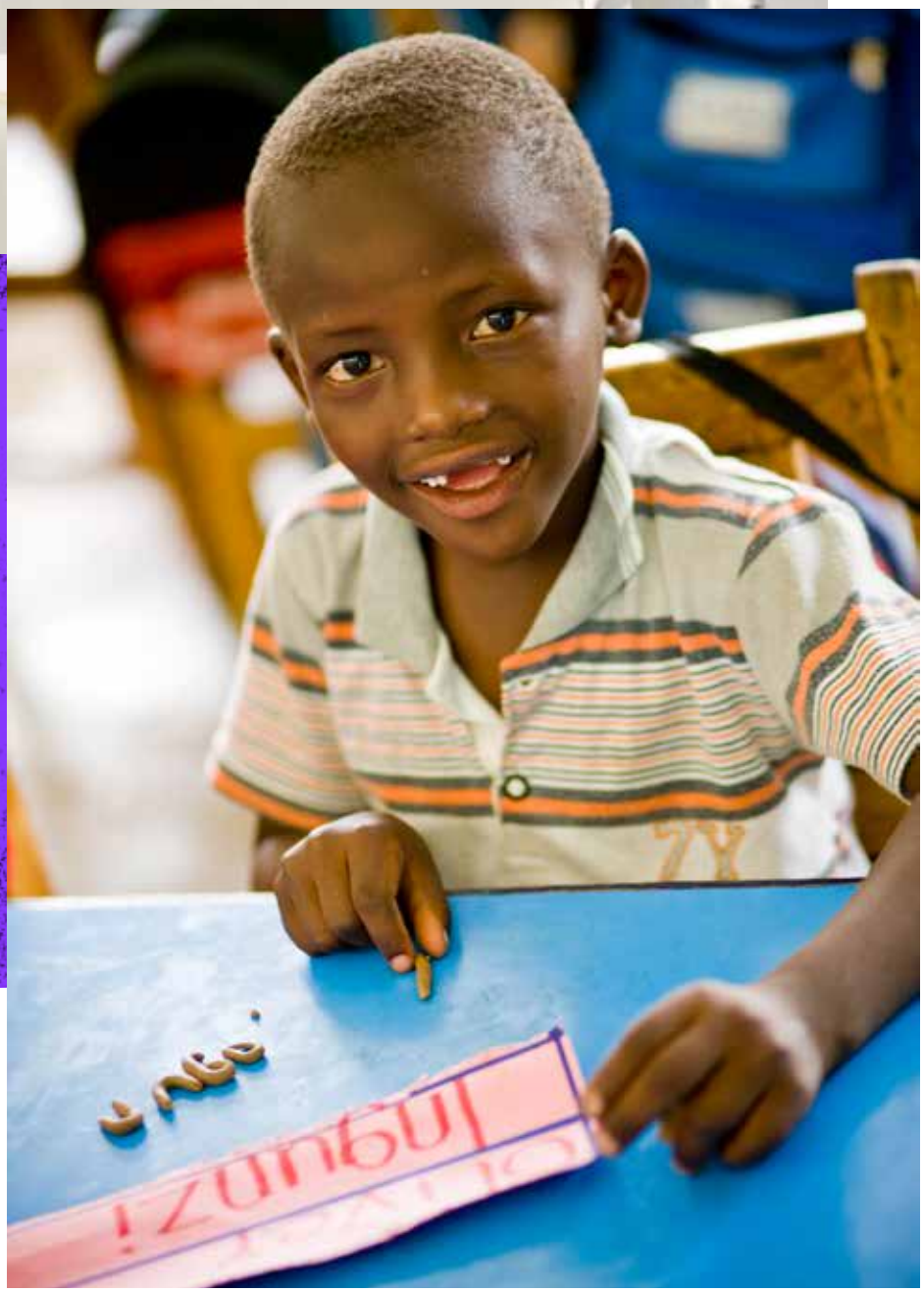
Kenya

In a historical investigation of school district expenditures in Kenya, Imerman and Otto (2003) observed that expenditures per student generally rise as district sizes fall below about 750 students, and remain relatively constant at enrolment levels above 1000 students. The indicator of expenditures per student exhibited a common pattern over time; expenditures per student increased from 1986/87 to 1993/94. Expenditure per student increased from Ksh. 770 in 1986/87 to Ksh. 2078 in the 1993/94 financial year (KIPPRA 2006; KIPPRA 2007). These figures excluded parents' contributions to their children's education. Data from the WMS III report showed that households spent about US$11.36 and US$18.35 at public and private primary schools, and about US$153.85 and US$162.86 per year at public and private secondary schools, respectively (Bedi, Kimalu, Manda, Nafula, 2004). Thus, the parental contribution to the education of a pupil in a public primary school accounted for about 26 per cent of the total per-pupil expenditure at the primary level (Government of Kenya, 1998).

Kenya introduced vouchers, stipends, and capitation grants in 2003 to address the cost of accessing education. Government documents reflect the government's strong commitment to meeting the EFA and MDGs targets (Republic of Kenya, 2002; MoEST, 2004, 2005). The Sessional Paper No. 1 of 2005 underscores that the cost of secondary education is the main reason for the low transition rate to secondary education. The report (MoEST, 2004) proposes that the government should address transition rates. In response, the Government developed the Kenya Education Sector Support Programme 2005-2010, which clearly states its intention to integrate secondary education into basic education (MoEST, 2005: 177). This policy framework became the backbone for implementing free secondary education.

Moving into the present, the Kenyan education sector receives the largest share of the national budget, with a total allocation of Sh628. 6 billion for the 2023-24 financial year

year, representing 27.4 per cent of planned national expenditure (GRK, 2023). According to UNESCO (2008), Kenya spends a relatively high proportion of its Gross National Product (GNP) on education. The report observes that in 2006, the total public expenditure on education was 6.9 per cent of GNP. Despite the relatively high expenditure on education, the GER in secondary education was only 31 per cent in 2006 (UNESCO, 2008). Lewin (2007) suggests that, in general, to achieve GERs of 110 per cent in primary, 100 per cent in lower secondary and 50 per cent in upper secondary, approximately 8.6 per cent of GNP would be required to be spent on education without any cost-saving reforms; or 6.3 per cent of GNP with cost-saving reforms. Lewin further suggests that no country with a secondary-to-primary unit cost ratio of more than 3:1 succeeds in universalising secondary education. This is a critical challenge in Kenya, given that the ratio of secondary to primary unit costs was roughly 3.4:1 in 2004/2005. This suggests that if Kenya were to achieve universal secondary education, the overall public expenditure on education would need to increase to 8.4 per cent of



GNP. Of that, at least 3 per cent of GNP would be required for secondary education, with cost-saving reforms of no more than a 3:1 ratio of secondary-to-primary unit costs. Unless the government radically changes its cost structure, Kenya is unlikely to achieve sustainable universal secondary education.

Eswatini

In a study carried out by Akinkugbe and Kunene (2001), an imbalance was found in the financing of education in Swaziland (now Eswatini). The study showed that, on average, about 30% of recurrent expenditure went to primary education. In comparison, the remaining 70% was divided equally between secondary and tertiary education and among other activity heads within the Ministry of Education. The study revealed that what was needed to educate a single university student would be sufficient to educate about 55 primary school students or about 20 secondary school students. Additionally, while the household contribution to the education system was quite high at the primary, secondary, and high school levels (over 40%), it was almost nil at the tertiary (postsecondary) level. The study found a serious resource constraint, particularly in the materials and supplies needed to provide high-quality education in Swaziland's primary schools.

Zimbabwe

Historically, secondary school expansion policy in Zimbabwe could be attributed to a high level of government policy and financial commitment and to prioritised expenditures sustained over a long period (Lewin and Caillods, 2001). Lewin and Caillods (2001) observed that during the expansion period, budgetary allocation to education was maintained at 8 to 9 per cent of GDP, while secondary allocation increased, with tertiary allocation held to

less than 10 per cent. At the same time, the unit costs of primary and secondary education remained stable, with the latter at a small multiple of the unit cost recorded for primary education (1:2). This contributed to the financial sustainability of enrolment growth in the secondary school cycle. The country adopted a system of sharing the costs of increased participation among all stakeholders, including local authorities, communities and community-based organisations, parents or households, hence easing the cost burden on the government.

However, more recent reviews of Zimbabwe have shown a shift in government policy towards education financing, with tuition fees now covered by households. Primary tuition fees for all Government schools, regardless of where the school is situated, are US$900 per year ($300/term), secondary tuition fees are US$1200 per year ($400/term).

Reflections and General Points from the International Comparison

A number of global calls to action on the provision of free education have been pushed forward in recent years, including through the United Nations. The African Union has also issued a call for free secondary education across sub-Saharan Africa by 2025 to reduce inequality and provide quality basic and secondary education (McQuade 2022).

The effectiveness of free education can depend on how the project is rolled out, and the cost of educating a child is closer to the per-child educational needs. For instance, South Africa's partial FSE, which was redistributive (eliminating fees in the poorest schools and maintaining them in richer ones), was found to be cost-effective. An approach implemented by Uganda for awarding scholarships showed limited benefits for the poor, as the poorest people often dropped out of primary school and thus did not receive a scholarship.

The cost-effectiveness of meeting the cost of educating a child is not necessarily a simple/straight-forward issue. Various arguments have been put forward about the feasibility of providing free education, which covers both primary and secondary education, as a Free Education policy has significant implications for fiscal policy and the budget of any given country. The high price tag of free education has also led educationists and politicians to question the sustainability and equity implications of fee abolition initiatives, especially for secondary education, including concerns about a diversion of focus from the provision of primary education.

The implementation of Free Education programs can negatively affect the quality of teaching and learning if other costs associated with educating a child are not carefully considered. Most importantly, this can lead to an overcrowding of classrooms and lower the quality of education as more students are suddenly attending primary and secondary education – as such, there should be an increase in teaching space and the number of qualified teachers.

Free Secondary Education can divert resources from basic education, creating major issues, especially for the poorest in society. There needs to be a vision for long-term funding to maintain and improve the quality of lower education, as well as to ensure that the quality of secondary education does not decline with increased demand. Zubairi (2018) has argued that investment in Free Secondary Education can reduce spending on primary education, exacerbating learning deficits and low completion rates.

For instance, looking simply at test scores and the percentage of students completing secondary school, Free Secondary Education is generally not very "cost-effective" compared to targeted scholarships. This is because the students who would have gotten scholarships and gone through are doing so anyway, but so are students with less strong educational backgrounds, who are more likely to fail. However, they also point out broader social benefits found in various contexts – increased average years of schooling, reduced chances of

girls going into marriage before age 15 and of teenage motherhood.

The general cost of educating a child, coupled with free education, often disproportionately benefits socioeconomically advantaged households, who can meet other costs such as books, shoes, uniforms, transport, school meals, and many other non-school fee expenditures. In contrast, non-fee expenditures can still keep education out of reach for many.

Literature Gaps

Global studies on unit cost or per-child expenditure have increased exponentially, as seen in works from Kenya, Rwanda, Malawi, and South Africa, among others. We do not seem to have evidence of how much it costs to educate a Zambian child annually across all types of schools, including spatial considerations.

The Ministry of Education in Zambia currently lacks clear evidence of the cost of educating a child in the country's public schools. Understanding the historical context, regional disparities, and country-specific nuances is essential for the GRZ as it endeavours to develop a robust costing framework. Tailoring the framework to account for institutional diversity and spatial considerations will be crucial for achieving the objectives of the Free Education policy and ensuring access to quality education for learners in Zambia.

Apart from earlier studies conducted by Michael Kelly in 1998 for the World Bank (Education in the Highly Indebted Country), and an assessment of the implementation of

the Free Primary School Policy (FPE) by the Ministry of Education in 2004, (Mwansa, A, Kaba A, Zulu L with Nyirongo G 2004), with funding from the UK Foreign Commonwealth and Development Office (FCDO; formerly DFID), there has not been any robust study conducted by the Ministry of Education to establish the true cost of educating a child in Zambia's public schools. As such, the MoE's Directorate of Planning and Information, which is mandated to plan and budget for the education sector, lacks this information to help guide budgeting and other decision-making for the country's schools. It is therefore imperative that this study assists the government of the Republic of Zambia in understanding the actual cost of educating a child, so it can comprehensively plan for education in Zambian public schools.

Throughout this literature, there is no focus on people with disabilities. This does not mean learners with disabilities do not exist in the formal school system. This study was deliberate by focusing on such groups of young people to ascertain how the cost of education per child affects them.

Unit Costing Conceptual Framework

In education, a school is considered a firm that shapes learners into the desired graduates (Kipyego et al., 2014). This process is not costless since it involves monetary expenditures. Unlike firms, most schools do not operate on a profit-maximisation basis but rather on a cost-effectiveness basis.

For this consultancy, and in line with other studies (Kipyego et al. 2014, Bray 2002 and Lewin and Caillods, 2001), the consultants used independent variables such as school size, average teacher salary, non-teaching staff recurrent expenditure (these include support staff and teachers on PTA support), expenditure on tuition or school fees, extracurricular activities, boarding fees (including food items), repairs, maintenance and installation, expenditure on transport (this includes field visits using the school bus and transport money to school by learners, expenditure on electricity, water and sanitation, medical expenses (including supplies in the first aid box and other medical supplies in the sick bay), and other expenditures. The dependent variable was the unit cost per learner.

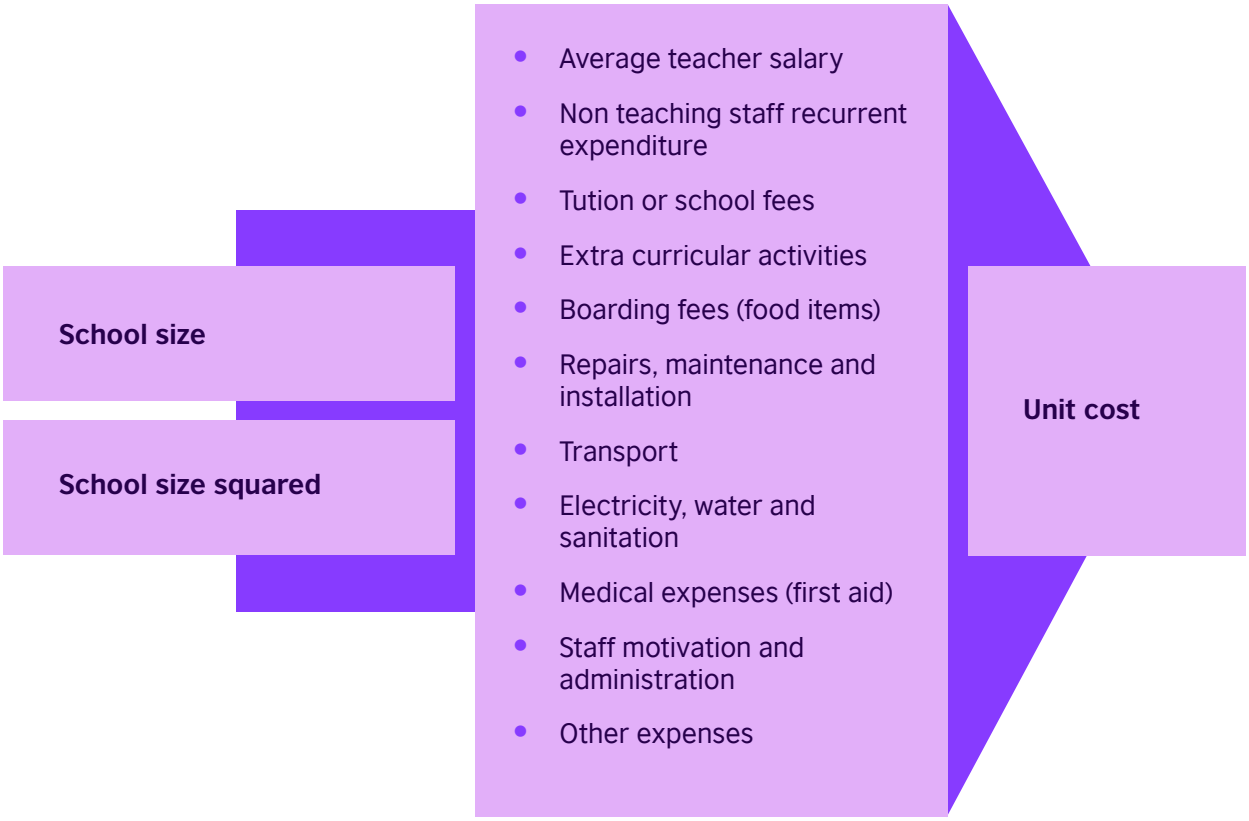


Figure 2.1: Conceptual Framework

Theory of Change

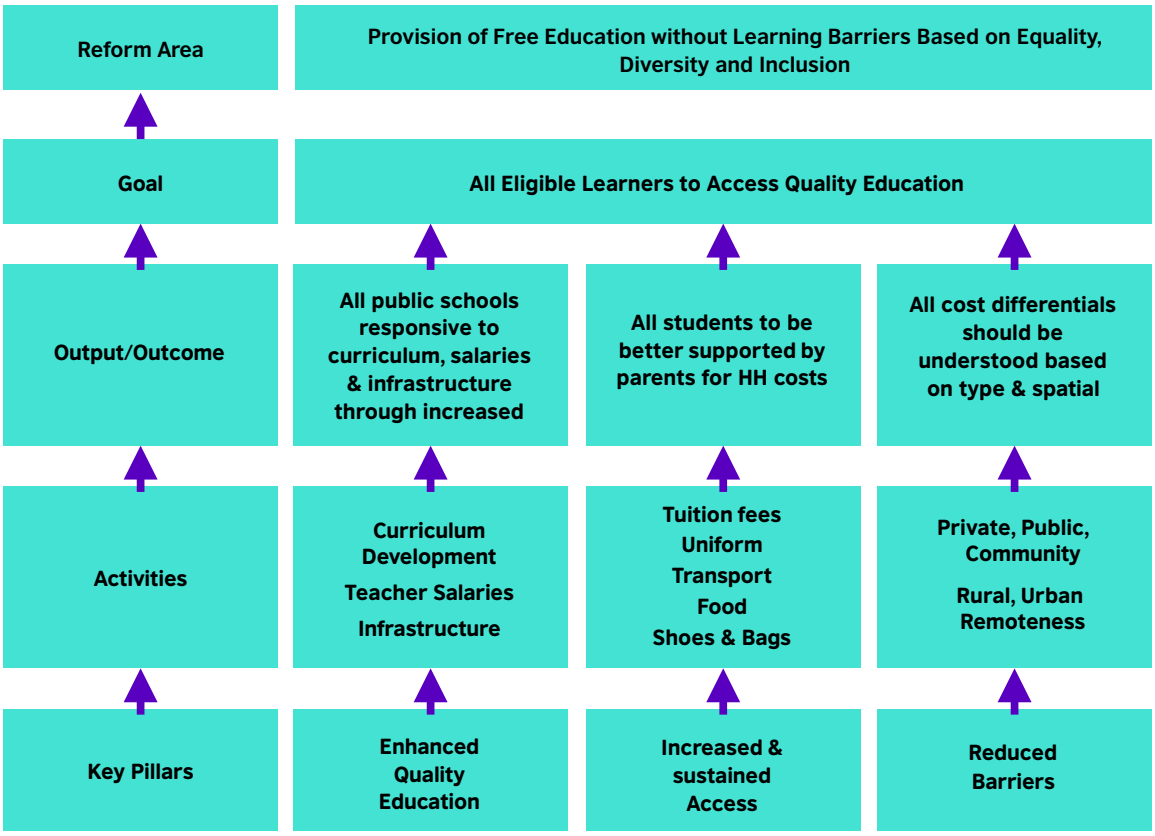
The Ministry of Education and the Ministry of Finance have expressed an urgent need to develop a comprehensive, change-responsive costing framework for the education sector to improve data and decision-making and ensure more equitable school financing. The Theory of Change for the provision of the Free Education Policy in Zambia is that all learners, boys and girls, particularly those from marginalised and socially and economically disadvantaged backgrounds, are provided with inclusive, equitable, quality education and learning opportunities. The Theory of Change asserts that eliminating barriers (such as school fees and other user fees, reducing the distance to school, or access to school in general) within the enabling environment, supply, and quality will enable girls and boys to achieve the outcome-level results. The Theory of Change also considers a comprehensive and integrated approach to achieving the Ministry of Education outcomes; it is situated within the current education policy, considers short- and long-term solutions, and draws on the global, regional, and national evidence base.

Below is the Theory of Change:

IF there is a strengthened governance system in the education sector, and IF girls and boys from early childhood to secondary education, including orphans and vulnerable children, SEN 1) have increased and sustained access to inclusive education; 2) have enhanced quality education for improved learning outcomes, and 3) have reduced barriers affecting gender,

free and inclusive education for improved equitable opportunities. Then, girls and boys, in particular the marginalised and those with Special Educational Needs (SEN), are provided with free, inclusive and equitable quality education and learning opportunities. The theory of change is therefore crafted around the major drivers of transformation to attain an effective framework for the cost of supporting a child in public schools, based on unit costs. At the activity and output levels, we have to consider both household- and school-based considerations, which are underpinned by access and quality.

This is shown in Figure 2.2 below:



The consultants first developed concise guidelines for using the costing framework, which the planners in the Ministry of Education will use. The consultants have also ensured that the framework will be gender and regionally responsive. The capacity building being suggested will be conducted more cost-effectively to enable easy cascade to the lowest levels of educational institutions. This approach will ensure value for money and sustainability. The main reform area in the theory of change is to have enhanced unit cost mechanisms in Zambian public schools, supported by the goal of developing a unit.

cost framework. The key pillars of this undertaking were determining the costs based on school- and household-based costs, operationalised through different activities and outcomes.

Strengths Weaknesses Opportunities Threats (SWOT) Analysis of the Study

The pre-implementation, or first stage, of the SWOT analysis involved examining the internal Strengths and Weaknesses and the external Opportunities and Threats related to the study. Below is the general outline of the analysis:

Strengths:	Weaknesses:
• **Access to Data:** Availability of reliable and comprehensive data on public school expenditures and resources. • **Collaboration:** Potential collaboration with educational institutions, government bodies, and other stakeholders.	• **Data Quality:** Concerns about the accuracy and reliability of the data collected, especially if there are gaps or inconsistencies. • **Time Constraints:** The study may face time constraints, affecting the depth of the analysis.
Opportunities:	**Threats:**
• **Policy Impact:** The study can contribute to evidence-based policymaking, influencing education funding and resource allocation. • **Stakeholder Engagement:** Opportunities for engaging with policymakers, educators, and communities to gather diverse perspectives. • **Comparison with International Benchmarks:** Benchmarking the cost against international standards can provide insights and opportunities for improvement.	• **Political Instability:** Political changes and instability that may affect the implementation of education policies or the study itself. • **Economic Challenges:** Economic downturns or fluctuations that could impact the funding and resources allocated to education. • **Resistance to Change:** Resistance from stakeholders, including policymakers or educational institutions, to accept or implement the study's recommendations.

It is important to note that the specific factors under each category will vary based on the context of the study, and therefore, ongoing analysis tailored to the unique circumstances will be carried out and documented. Additionally, continuous monitoring and adjustments to the SWOT analysis will be necessary as the study progresses and new factors emerge.

Chapter 3:

Study & Costing Methodology

This chapter discusses in detail which approach, designs, study sites, population, sample, analysis and ethical considerations. Further, the methodological considerations for international comparison were also discussed.

Study Approach, Design and Unique Special Considerations

The research employed a nested approach, also known as the embedded method, which integrates both quantitative and qualitative data collection methods to offset the inherent strengths and weaknesses of each. The mixed methods research design, specifically the embedded approach, is a comprehensive strategy particularly associated with the work of John W. Creswell, a prominent researcher in the field. The embedded design involves one type of data (either qualitative or quantitative) being more emphasised than the other, with one set of data embedded within the other.

The study on determining the cost of education per child employed this method to provide a comprehensive analysis of the true cost of education within the public school set-up in Zambia. In addition, with the embedded approach, triangulation was employed, and according to Creswell (2014), triangulation is a method used to increase the credibility and validity of research findings. Credibility refers to a study's trustworthiness and believability. In contrast, validity concerns the extent to which a study accurately reflects or evaluates the concepts or ideas being researched. Triangulation in this study on determining the cost of education per

child was achieved by combining theories and methods, helping to ensure that fundamental biases arising from a single approach, be it quantitative or qualitative, were overcome.

The research thus leveraged triangulation, integrating quantitative and qualitative findings to enhance the study's overall validity and reliability. The quantitative component provides numerical measurements and statistical rigour, enabling generalisability and the identification of patterns and trends. Simultaneously, the qualitative component added depth and context, capturing the richness of participants' experiences and offering insights into the underlying factors that may not be evident through quantitative measures alone.

Development of a Costing Framework

To calculate unit costs of education provision in Zambia, a range of data is required. The effective costs of education must be well understood, including all annual inputs required for a school to educate its learners. A clear classification of cost drivers must be established, and a standardised cost applied against each item to ensure consistency in costing.

Developing a costing framework that reconciles both school and household-based costs of educating children, while also considering institutional type and spatial considerations (rural, urban, and remoteness), was a complex but essential task; a robust set of data was essential to determine the cost of education per child.

Unit cost is the cost per educational unit. In the case of Zambia, the cost per student and the cost per school are key considerations at ECE, Primary, and Secondary. While estimating unit cost, due care should be taken to avoid ambiguity. In calculating unit costs, the consultants considered the cost per learner by examining the following:

1. Cost per student enrolled
2. Cost per student actually attending school;

The school cost analysis was based on school-based costs, including expenses directly incurred by educational institutions as they deliver on their mandate to educate learners. The assessment must also include household-based costs, including the expenses borne by households to support a child's education. Once the school- and household-based costs were contextualised, they employed the unit cost formulae to assess the cost per unit, which equals variable costs plus household costs plus school-based costs, minus the costs covered by the free education policy. This formula helped us understand the four main types of cost analysis: cost-feasibility, cost-effectiveness, cost-benefit, and cost-utility.

Identification of Key Cost Components

School-Based Costs: These included expenses directly incurred by educational institutions, such as teacher salaries, infrastructure maintenance/ development, equipment and supplies, curriculum development, utilities, and so on.

Household-Based Costs: These encompassed expenses borne by households to support a child's education, such as uniforms, meals, transportation, and supplementary learning materials.

Before final computation, it is important to create a Cost-Weighted Index that reflects the relative importance of each cost component for different institutional types and spatial considerations. Cost has to be normalised by other indices, such as the Consumer Price Index.

index and CPI for the country of discussion. For instance, transportation costs might be more significant for rural schools, while teacher salaries might be a larger proportion of costs in urban schools. Prescribed costs might differ from reality, especially in remote and rural areas. Different respondents also supported the different categorisation, which should be included in the framework, as shown in Table 6.2

The process for gathering key cost components included the following steps:

1. Use of a survey questionnaire with Key Informants and households, and conducted structured interviews with a representative sample of families from different socioeconomic backgrounds and geographical areas. This helped with the collection of data on the various expenses incurred by families to send their children to school.
2. Itemised Expense Identification from the school side includes the cost of infrastructure, teacher salaries, curriculum, materials, among others
3. Itemised Expense Identification at household: Ask families to itemise their expenses related to sending children to school. Ensure that the survey covers all potential costs, such as:
    - Uniforms and clothing (including shoes and school-specific attire).
    - School supplies (notebooks, pens, pencils, rulers, erasers, etc.).
    - Transportation costs (bus fares, bicycles, walking distances, etc.).

- Food and snacks for school (daily meals or snacks).
- School bags and stationery (backpacks, lunchboxes, etc.).
- Extracurricular activities or fees.
- Miscellaneous expenses (e.g., exam fees, field trips, special projects).

4. Cost Estimation and Aggregation: Calculated the average and median costs for each expense category and ensured that both recurring (e.g., monthly transport costs) and one-time expenses (e.g., uniform purchase at the beginning of the school year) were captured.
5. Family Income and Socioeconomic Data: Collected data on family income, household size, and socioeconomic status to understand how these factors influence the cost burden of sending children to school.
6. Spatial Considerations: Factored in the geographical location of families. Costs can vary significantly between urban, rural, and remote areas. Ensure that you analyse expenses separately for each spatial context.
7. Policy Implications: Analysed how the Free Education/Education for All Policies have influenced these costs. Assessed whether these policies have effectively reduced the financial burden on families and improved access to education while maintaining quality.
8. Data Validation: Cross-checked the collected data through various means, such as comparing it with regional cost-of-living indices or validating reported expenses with school records or receipts.
9. Reporting and Analysis: Present the findings clearly and concisely, including average costs per family, regional variations, and the percentage of household income spent on education-related expenses. Use charts and graphs to make the data more accessible.
10. The consultant modelled the data and produced a new unit cost analysis framework which could either be adapted or adopted by different stakeholders, especially in the education sector.
11. Policy Recommendations: Based on the analysis, provide policy recommendations to address any cost-related barriers to education. This may include targeted subsidies, provision of free textbooks or uniforms, or transportation assistance for families in need.

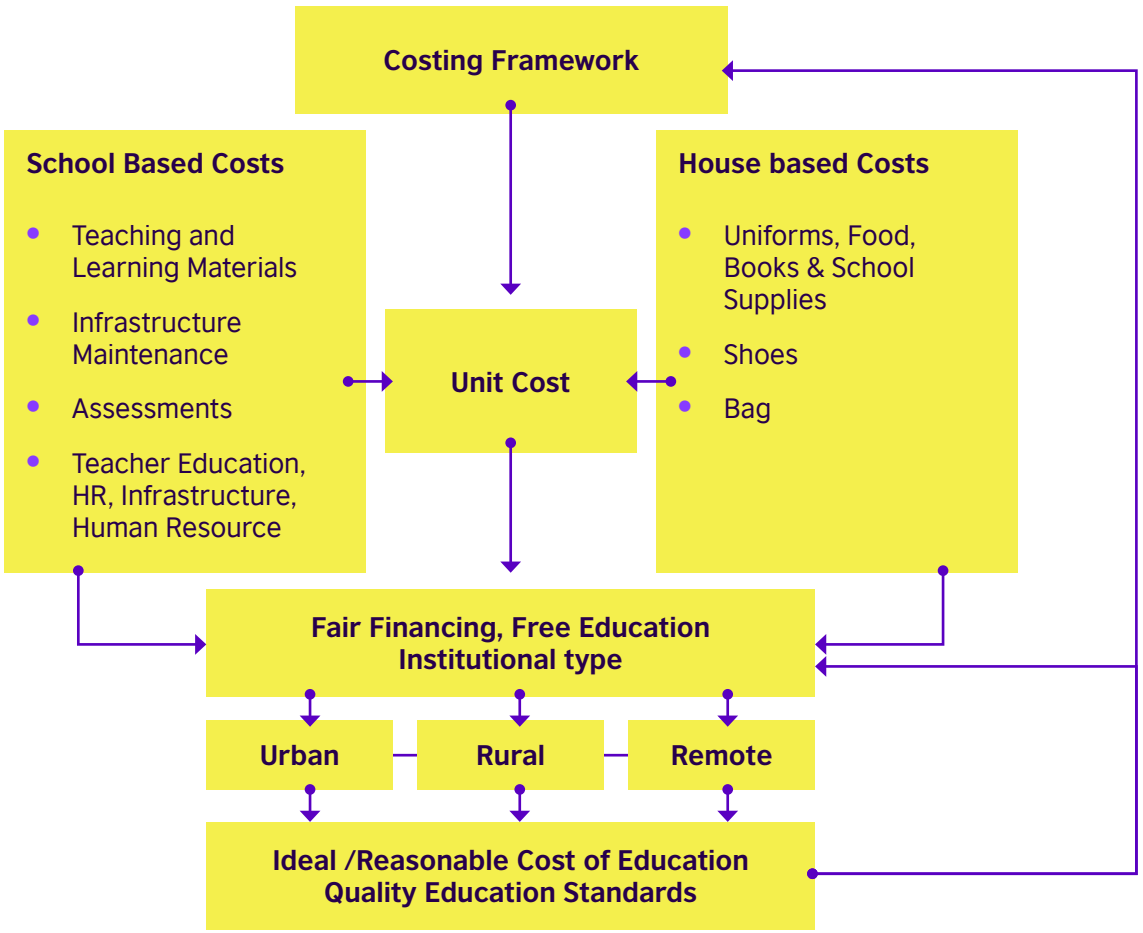


Figure 3.1: Costing Framework

Study sites and target audience (s)

The study was conducted at the national level, with a representative sample from five (5) provinces. Specifically, the selected study sites included Copperbelt, Eastern, Luapula, Lusaka and Southern Provinces. To select the provinces, the following criteria were considered based on a trend analysis from 2015 to 2020, for which statistical data are available from the Ministry of Education and the Living Conditions Survey reports produced by ZamStats.

1. Provinces with the highest enrolment rates, high population rates, comparatively lower poverty levels and urban provinces with more economic activities: Lusaka and Copperbelt Provinces.
2. Provinces with the lowest nominal figures, high teenage pregnancy, and early marriages. Value attached to sending children to school against cultural and economic practices such as herding cattle, fishing, Chinamwali/Nkolola/Chisungu, etc. and dropout rates with low economic activities in Luapula and Eastern Provinces
3. Province with average nominal figures based on the living condition survey report of 2015: Southern Province

It is worth noting that during the selection of schools in the sampled districts, attempts were made to ensure that a combination of under-performing and performing schools were sampled. This was done in consultation with the District Education Board Secretary's (DEBS) office, the MoE administrative office present at the district level.

In each of the sampled provinces, three (3) districts were identified based on the criteria of rural, urban and remote. Primary and secondary schools were purposively selected based on accessibility criteria, as data were collected during the rainy season, when most roads in rural provinces were impassable. The district selection was stratified by (a) geographic region and (b) urbanicity (urban, rural, and remote) (see Table 2.5). The reason for classifying districts into three categories is to identify salient issues that may affect the cost of education. In addition, the location of a district (urban, rural, or remote) may explain factors contributing to low enrolment and completion rates among learners in these districts, high teenage pregnancies, and generally low participation in education. It is therefore important to disaggregate data by these criteria.

With regards to the target audience in each of the selected sites, the following were included: the GRZ officials (including senior officers from the MoE, Finance and National Planning and Ministry of Community Development and Social Services); the Civil Society Organisations, Faith-based Organisations, Schools, International NGOs and their contractors, households and community gatekeepers (see Table 3.1)

Province (s):	District and Stratification (Urban =U, Rural =R, Remote = Rmt):	Target Audience (s)
Lusaka	Lusaka = U Rufunsa= R Luangwa = R+Rmt.	GRZ, Cooperating Partners, CSO Organisations, FBO, Schools, International NGOs and contractors, Households and Community Gate Keepers
Copperbelt	Kitwe = U Lufwanyama=R+Rmt. Luanshya = U	GRZ, Cooperating Partners, CSO Organisations, FBO, Schools, International NGOs and contractors, Households and Community Gate Keepers
Eastern	Chipata = U Chadiza = R+Rmt. Katete = R	GRZ, Cooperating Partners, CSO Organisations, FBO, Schools, International NGOs and contractors, Households and Community Gate Keepers
Luapula	Mansa = U Samfya = R Chembe =R+Rmt.	GRZ, Cooperating Partners, CSO Organisations, FBO, Schools, International NGOs and contractors, Households and Community Gate Keepers
Southern	Choma = U Kalomo = R+Rmt. Pemba = R	GRZ, Cooperating Partners, CSO Organisations, FBO, Schools, International NGOs and contractors, Households and Community Gate Keepers

Table 3.1: Study geographical sites and target audiences

Study Duration

1 December 2023 to 29 February 2024 (3 Months)

Sample size

For the study, a sample of 1071 respondents and participants was selected using both purposive sampling (including gender and the inclusion of marginalised learners based on the latest).

statistical data from the Ministry of Education) and random sampling techniques, and from the headquarters, five (5) provinces and 15 districts. At headquarters, provincial and district level, various categories of individuals and stakeholders, including key government officials, Cooperating Partners (CPs), Civil Society Organisations (CSOs), Faith Based Organisation (FBOs), International NGOs and Households, Community Gate Keepers and learners with disabilities were purposively sampled to provide qualitative and quantitative data through in-person interviews and FGDs. The data collected was helpful to respond to the main purpose of the consultancy, which was to establish the cost of educating learners in public schools.

Data collection techniques

In this research design, both qualitative and quantitative data were collected concurrently to complement each other effectively. The study was heavy on the qualitative approach and yet significantly relied on the quantitative data to reinforce the qualitative findings, as the quantitative data was explained using the qualitative data.

The quantitative data were collected using questionnaires, which helped provide extra details that would explain the quantitative data. The qualitative tools included In-depth interview guides and Key Informant Interview (KII) guides. Concurrent triangulation was used in this study, in which both qualitative and quantitative information were collected concurrently and given equal priority. This assisted in achieving the objectives of the research, as this process is time-efficient and enabled the researcher to obtain information under both methods, which supplement each other in determining the findings, and finally, recommendations.

Focus Group Discussions (FGDs)

A total of 45 FGDs in 15 districts were conducted with community members and with learners from selected public schools. The FGDs helped collect qualitative information on the cost of education and the challenges that likely exist due to the lack of data on the actual cost of education, including for learners from vulnerable households. It was envisioned that the data collected would also highlight participants' understanding and perceptions of the actual cost of education.

Key Informants Interview (KII)

A total of 38 individuals were drawn from government institutions, Cooperating Partners, CSOs and FBOs to form the sample of KIIs, at the headquarters level in Lusaka. Other KIIs included Provincial Education Officers (PEOs) and District Education Secretaries (DEBS) in

the selected provinces and districts. Interviews were also conducted with the Senior Planning Officers, whose core mandate is to prepare budgets for the provinces, and the headteachers, who are the gatekeepers at the school level. See Table 3.2 below for details.

Category	Description	Number of Individuals
GRZ	• Education HQ (Planning, Finance, HR, PSs - Technical and Admin, CDC director) • Ministry of Finance HQ (Planning, Finance, HR, PSs -Technical and Admin) • Ministry of Community Development • Department of Gender • Teaching Council • Teaching Service • University of Zambia (Education Dept.) • HELS Board • PEO, DEBS, SPOs, Headteachers	20
CSO	• ZANEC • NAQUEZ • CAMFED • FAWEZA • ZOCS	5
FBOs	• ZEC • UCZ Synod • JCTR	9
Schools	• Head teachers • Teachers • Parents • Teachers responsible for procurement and Finance • Learners (FGDs), including learners with disabilities	1020 teachers, parents and heads 45 FGDs
International NGOs and contractors	• IPA • Child Fund • School International • VVOB • Oxfam • Care International • Plan International • World Vision • EDC – Let's Read	10
Hoiseholds and Community Gate Keepers	• Senior Chiefs • Headmen • MPs • Parents/Guardians • PTCs	50

Table 3.2: Sample size and categories

School-level Interviews

Interviews at the school level included head teachers, members of the school procurement committee, and members of the Parent Teacher Committees (PTCs). As the gatekeepers and implementers at the school level, the head teachers were critical in providing information on school funding and on how funds received from GRZ and other donors are used to run the school and ensure learners learn. The school procurement committee, responsible for preparing school budgets and procuring school requisites, was critical in providing information on the costs of running the school's day-to-day activities.

At the community level, wards were sampled from a list of all known wards in each district. Depending on the size of the district, four (4) or five (5) wards were purposively selected, and the total number of households per ward selected was proportionate to its size. Finally, systematic random sampling was used to select specific households in each ward. Households in the communities were selected by picking every second house in approximately 50 metres on either side (right or left). To be eligible, participants ought to have been between 18 and 49 years and had been living in the community for six (6) months or longer.

Parents, Head Teachers and Teacher Questionnaire

The parameters used in the sample size calculation were based on simple random sampling. The population constituted the number of head teachers, teachers and parents in particular zones, which were first selected based on the Information Management System (IMIS) in the Ministry of Education and Living Condition surveys showing:

- Copperbelt (Kitwe, Lufwanyama and Luanshya), Eastern (Chipata, Chadiza and Katete)
- Luapula (Mansa, Chembe and Samfya), Lusaka (Lusaka, Luangwa and Rufunsa), Southern (Choma, Kalomo, and Pemba)

The sample was drawn from schools with the highest attrition and dropout rates, while others were those with the highest attendance, based on data from the planning department in the Ministry of Education. Schools were segregated into different types: public, private, grant-aided, and community. These were further segregated across ECE, Primary, and Secondary, and by urban, rural, and remote spatial characteristics. The total population based on the characterisation for teachers, parents and head teachers for the selected schools was 12,005 for the 15 districts in 5 provinces (ii) a confidence interval of 95% (Z-score 1.96) and (iii) a precision/margin of error of 2.5%. Sample size calculations will be done using the formula below (Note that a Finite Population Correction is applied to the sample size formula);

$n = N*X / (X + N - 1)$,

where,

- $X = Z\alpha/2 * p * (1 - p) / MOE2$
- $Z\alpha/2$ is the critical value of the Normal distribution at $\alpha/2$ confidence level of 95%,
- α is 0.05, and the critical value is 1.96),

- MOE is the margin of error,
- p is the sample proportion, and
- N is the population size.

The formula yielded a sample size of 1020, which, after adjusting for 10% oversampling to include non-response, never at home and other community aspects which may have affected the initial sample size, came to 990 teachers, head teachers and parents.

Data collection procedures and field work

Data Collection Tools

Data was collected through surveys, FGDs and KIIs. To ensure the collection of quality and appropriate data, several data collection tools were used in this study. For instance, in collecting quantitative data, the questionnaire was the primary instrument employed. It was administered to a member of a randomly selected household in the targeted communities who was willing to give information and aged between 15 and 49 years. As for the tools for qualitative data collection, in-depth interview guides and KIIs were utilised to collect information from civic and local opinion leaders, including headmen, who are also decision makers at the community level.

Development of field data collection tools was further informed through review of existing literature and relevant tools, including those found in other countries during the literature review.

Data Collection Process

In the interest of quality data, a team of 20 research assistants consisting of experienced and well-trained individuals were recruited to collect data. Prior to field work, a three-day training was conducted in Lusaka, of which one day was for pilot testing of the tools in Kafue and Chilanga. The pilot testing of the tools ensured the quality and relevance of the questions in the tools. The training was pivotal to the success of the study because it provided the research assistants with a platform to familiarise themselves with the data collection tools and the standard procedures during fieldwork. Apart from group sessions, the modelling sessions allowed for supervisors to provide clear guidance on how best to collect data.

Hotline consultants closely worked with the British Council consultancy management team to handle all aspects of the fieldwork. Proper recruitment and training of the research assistant team were essential for high-quality data analysis after fieldwork. The process included the following:

1. Research Assistant recruitment and preparation for the quantitative component
2. Facilitator and note-taker recruitment and training for the qualitative component

3. Field supervisor recruitment and training for both components
4. Rehearsal on translation of the questionnaires during the interview, participants agreed on the correct word equivalent in the local language.

Finally, to ensure that high-quality data were collected and minimise measurement errors, the community baseline survey questionnaire was pre-tested by administering it to selected participants outside the sampled districts.

Data Analysis

Microsoft Excel and SPSS were used to clean and analyse the data. Collected data were presented in tables, graphs, and charts, and further analysed using descriptive and inferential statistics. Conversely, qualitative data were analysed thematically and through cross-content comparisons. This is supplemented by meta-inferencing the two sets of data using the embedded design.

1. Collected School-Based Costs: Gathered data on school-specific expenditures from various sources, including government budgets (national and sub-national levels), school financial records, and interviews with school administrators. The data was collected from public records and the relevant ministry's budget.
2. Collected Household-Based Costs: Conducted surveys and or interviews with parents and guardians to understand the expenses they incur related to their children's education
3. Grouped the collected data by the type of educational institution (public, private, or community) and spatial considerations (rural, urban, or remote).
4. Calculated average Per-Child Costs for each cost component within each institutional type and spatial category. For example, you can determine the average per-child transportation cost for rural public schools, urban private schools, and remote community schools.
5. Carried out data analysis using parameters defined above
6. Created Cost-Weighted Index: that reflects the relative importance of each cost component for different institutional types and spatial considerations. For instance, transportation costs might be more significant for rural schools, while teacher salaries might be a larger proportion of costs in urban schools.
7. Used data from the cost-weighted index to advocate for and guide decisions on Funding Allocation to schools based on their specific characteristics. (Note: while recommendations on potential next steps have been made in the final costing report, follow-on advocacy and decision-making regarding how these recommendations will be taken forward is outside the scope of this assignment.) For example,

transportation costs may be significantly higher for rural schools than for urban schools. The cost-weighted index indicates that transportation expenses should receive a higher weight in the funding allocation formula for rural schools. Consequently, more funding will be allocated to rural schools to cover these additional costs and ensure equitable access to education.

8. Periodic Review and Update: Continuously monitor and review the costing framework to account for changes in expenses, shifts in enrolment patterns, and adjustments in educational policies. Regular updates will ensure that the framework remains relevant and accurate over time.

By following these steps, incorporating the factors defined above, and customising the framework to the specific context, a comprehensive costing framework was developed that reconciles school and household-based costs of educating children while factoring in institutional type and spatial considerations. This approach promotes equitable access to quality education and efficient resource allocation.

Ethical Considerations during the Study

The study protocol was submitted to the ethics committee of the private Ethics Review Board (ERB), UNZA BREC, for ethical approval. This is a required process, as the data to be collected may involve individual personal data on household characteristics and the cost of education. The ERB approved the study before its commencement.

Permissions were also sought from the Ministry of Education to conduct the study in schools. Before all participant interviews, it was made clear that the interview could be stopped at any time if participants felt uncomfortable responding to a question, particularly in relation to personal information such as income. Furthermore, the selected data collectors were experienced, mature interviewers trained to respect interviewees. The entire research team was further oriented on the British Council Code and the Core Humanitarian Standards.

Consent and Assent

Informed consent was sought from all eligible participants over the age of 18 before they participated in the study and confirmed by participant review and signature on the prepared consent form. This consent form was accompanied by an information sheet, which contained the objectives of the study and the

benefits of participating in the study, which was given or read out to the study participants before they could be requested to sign the consent form or requested to assent and was translated to local languages as required for implementation of the survey. The research team provided this information with sufficient experience or training in research ethics.

To target study respondents under 18 years of age, the consultant team prepared an assent form that was administered. Further, these respondents were interviewed in the presence of teachers, parents, or guardians, in an environment of their preference, where they felt most secure and comfortable. The sample comprised both in-school and out-of-school children. The team of data collectors was made aware of the specific children's rights and privileges that must be respected. Also critical to this is ensuring that the processes for obtaining both consent and assent are fully respected.

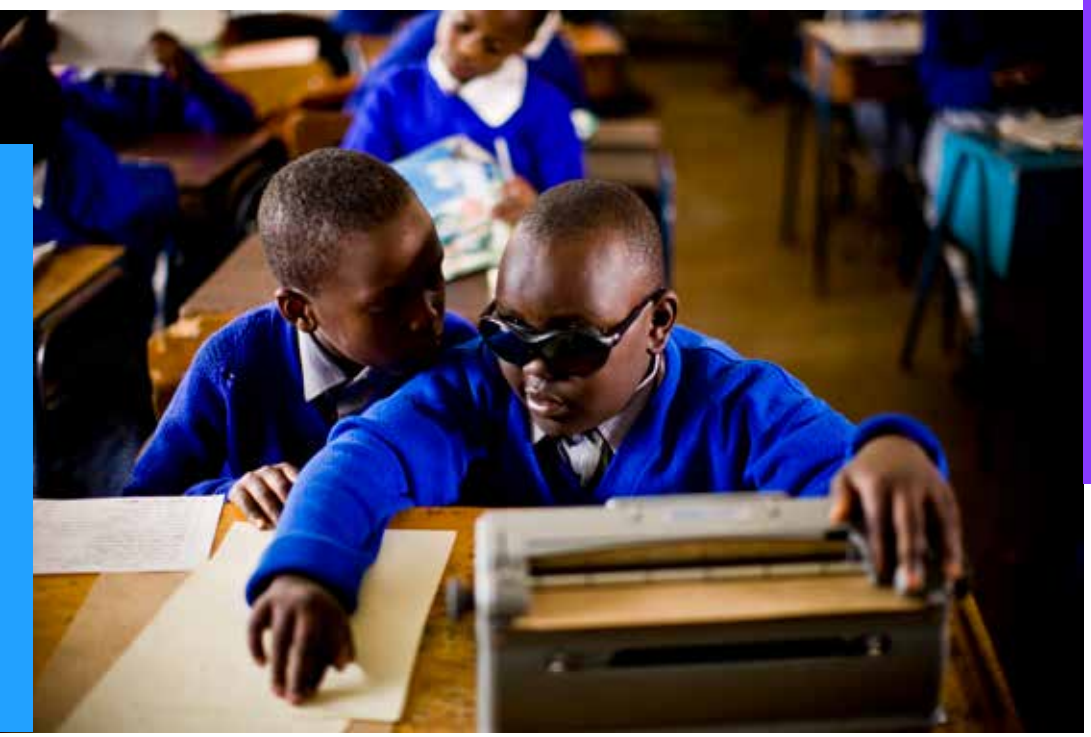
Confidentiality

Confidentiality was observed throughout the study period. All interviews were conducted in private, and strict confidentiality was maintained. Adolescents were assured that nothing said during the interviews would be in any way reported to their parents or guardians, for those where the parent or guardian was not present. All participants were informed that no personal identifiers, such as names, were disclosed in any dissemination, including scientific publications. The audio recordings have been securely stored by Hotline in case BC or the Ministry of Education wants access to them.

Equity, Diversity & Inclusion

This exercise required a strong focus on the principles of equity, diversity, and inclusion to support intersectional groups, including people of different religions, sexual orientations, races, ethnicities, abilities, and genders. The consultants hold these values in high regard and endeavour to ensure diversity, equity and inclusion across all operations. During the study, the consultant team remained aware that different populations, disaggregated by age, sex, disabilities, and sexual orientation, may have different opportunities within and approaches to the education context. While not the focus of this exercise, gender-transformative approaches to engagement were upheld as assessments and interventions were carried out, leveraging the critical principles of safeguarding, with all groups approached with sensitivity and compassion.

The firm further prioritised that the mix of staff (both full-time and part-time) was well balanced between men and women. With regards to data collection, the firm ensured that both groups were represented in all meetings, either separately or jointly. Gender dynamics were also taken into consideration in facilitating discussions, with the aim of respecting local practices as much as possible.



Chapter 4:

Findings Of The Study On Unit Cost (Educating A Child)

This section presents the findings from the five provinces. It is divided into different subsections. The first subsection presents the demographic data of the respondents. The second subsection presents findings on respondents' perceptions of what constitutes the unit cost. The third subsection discusses household cost elements, followed by school-based costs, before finalising mean scores for different cost itemisations and differentials based on spatial considerations.

Number of Interviews Conducted

Table 1 below shows the total number of interviews conducted across five provinces, for a total of 994 respondents. Specifically, Table 1 reveals that Luapula and Southern provinces accounted for 20.4% and 20.8% of the total respondents, respectively. Respondents from the Copperbelt and Lusaka provinces were at 18.9% and 19.4%, respectively. Table 1 further reveals that teachers constituted the majority, accounting for 79.4% of the total respondents, while Head teachers accounted for 7.7%. Additionally, parents and households collectively represented 12.1% of the respondents. The data reveal that the majority of respondents (approximately 92.5%) had at least one child attending school, highlighting the prevalence of school-going children in the surveyed population.

An additional 150 KIIs were conducted with individuals from government

institutions, Cooperating Partners, CSOs, and FBOs to form the sample of KIIs at the headquarters level in Lusaka. Other KII will include Provincial Education Officers (PEOs) and District Education Secretaries (DEBS) in the selected provinces and districts. Interviews were also conducted with the Senior Planning Officers, whose core mandate is to prepare budgets for the provinces, and the head teachers, who are the gatekeepers at the school level. In addition to KIIs, 45 Focus Group Discussions were conducted with learners, while parents from urban, rural, and remote areas were interviewed.

Types of Schools visited

Findings presented in Table 4.2 show that the majority (82.7%) of the schools visited were public schools, grant-aided and mission schools, including NGO funded schools, which accounted for 8.4%, while community and private schools accounted for 6.5% and 2.3%, respectively, underscoring the importance of assessing the diverse educational models present in the Zambian education sector.

The analysis of the level of schools visited presented in Table 4.2 below reveals a focus on secondary education institutions, which accounted for 45.9% of the total schools visited. Primary schools visited constituted 37.4% of the total. A focus on secondary schools to

Finding out the unit cost per learner is critical for understanding the dynamics and challenges encountered in the implementation of the free education policy at this level. Further, including primary schools in the study enabled the consultants to adopt a comprehensive approach to assessing foundational education in the context of the free education policy and in determining the unit cost per child. Early Childhood Education (ECE) facilities were visited to a lesser extent, comprising 3.8% of the visits, indicating a potential area for further exploration within the education system.

Type of School	%
Public	82.7%
Private	6.5%
Grant Aided	8.4%
Community	2.2%

Level of School Associated with:	%
ECE	4.5%
Primary	42.9%
Secondary	52.6%

Table 4.1: School types visited

Demographic Data of Respondents

This section delves into the findings derived from various background characteristics of the surveyed population, including age distribution, gender representation, educational qualifications, household income levels, level of schooling associated with, and residence.

The analysis of age distribution reveals distinct demographic segments spanning from early adulthood to senior citizens, offering insights into the diverse lifecycle stages present within the sampled population. Additionally, gender distribution highlights the participation of both males and females, while educational qualifications highlight a range from individuals with no formal schooling to those holding advanced degrees.

Furthermore, household income levels reflect a diverse spectrum, from modest to relatively higher income brackets, suggesting varying economic backgrounds among respondents. Lastly, the distribution across urban, rural, and remote areas underscores the geographical diversity of the surveyed population, reflecting a comprehensive representation of individuals from different geographic settings. These background characteristics serve as a foundational framework for interpreting and contextualising the subsequent findings related to education in Zambia.

Spatial Distribution of Respondents

Figure 4.1 below presents the spatial distribution of respondents across urban, rural, and remote areas. Findings (figure 3) indicate a relatively balanced distribution across urban (34.7%), rural (40.8%), and remote areas (24.4%), highlighting a diverse representation of individuals from various geographic settings.

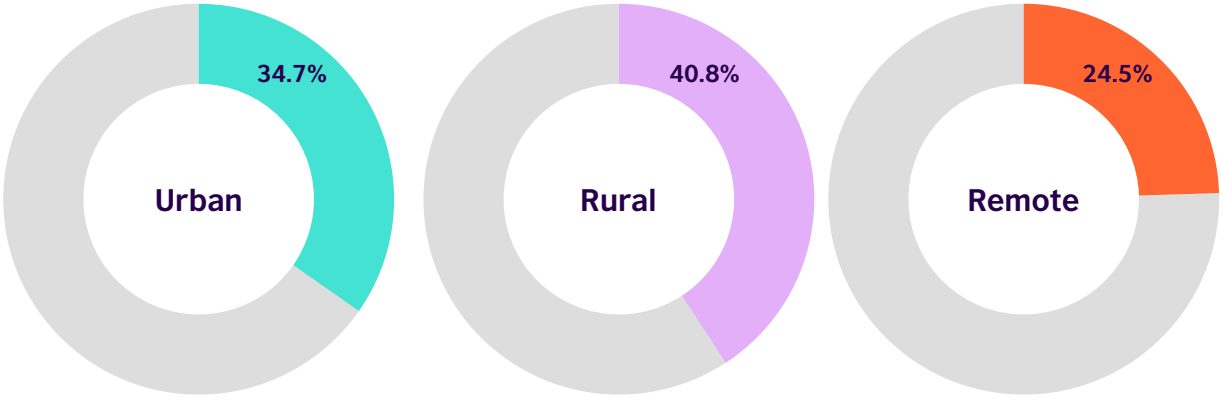


Figure 4.1: Respondents' Location (Spatial

Gender Distribution of Respondents

Figure 4.2 below shows the gender distribution of the respondents. The figure shows that 57.9% of respondents were females, while males accounted for 42.1% of the total sample. This might be attributed to females being more receptive to discussing children's education.

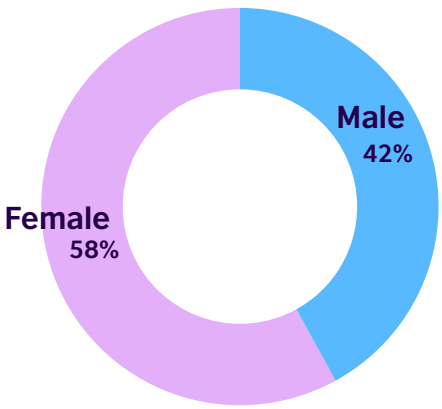


Figure 4.2: Gender distribution of respondent

Age Distribution

The analysis of age distribution delineates distinct demographic segments crucial to informing the Government of Zambia (GRZ) in developing a comprehensive costing framework for education. Figure 5 below reveals a diverse demographic landscape within the population, spanning the 20-29 to 60-and-above age categories.

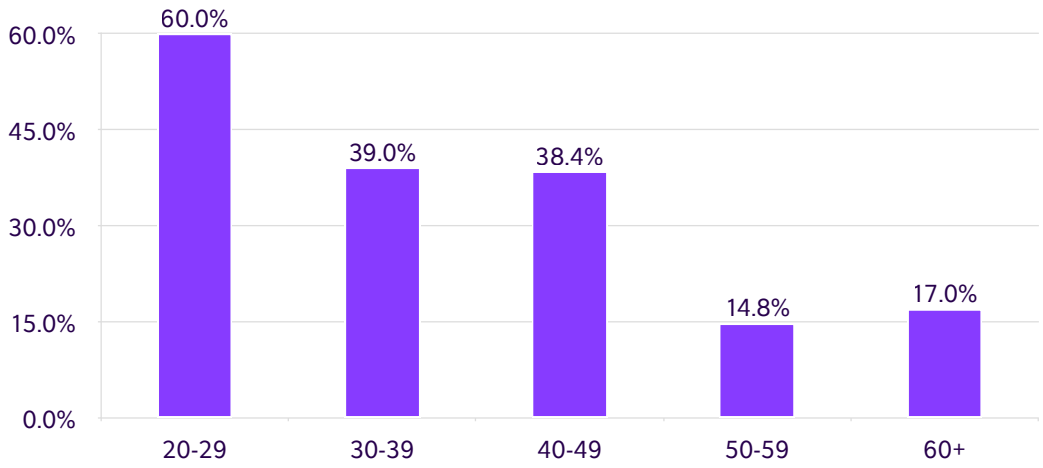


Figure 4.3: Age of Respondents

Only 6% were aged between 20 and 29 years. Almost a quarter (39%) of the respondents were aged 30-39, and 38.4% were aged 40-49 years, respectively. It may be worth noting that the smallest segment was those aged 60 and above, which is perhaps not surprising, given that this age group likely has fewer school-age children than other age segments. Integrating the views of different age categories with institutional types and spatial considerations will facilitate equitable school financing and the effective implementation of the Free Education policy in Zambia.

Respondents' Monthly Income

Figure 4.4 below shows that slightly over half (55.8%) of all respondents interviewed reported that their monthly income was within the range of 3001-8000 ZMW, indicating a significant portion of the population with moderate incomes. Additionally, almost 30 % (29.1%) of the respondents reported incomes within the range of 8100-20000 ZMW, reflecting a notable presence of individuals with relatively higher income brackets.

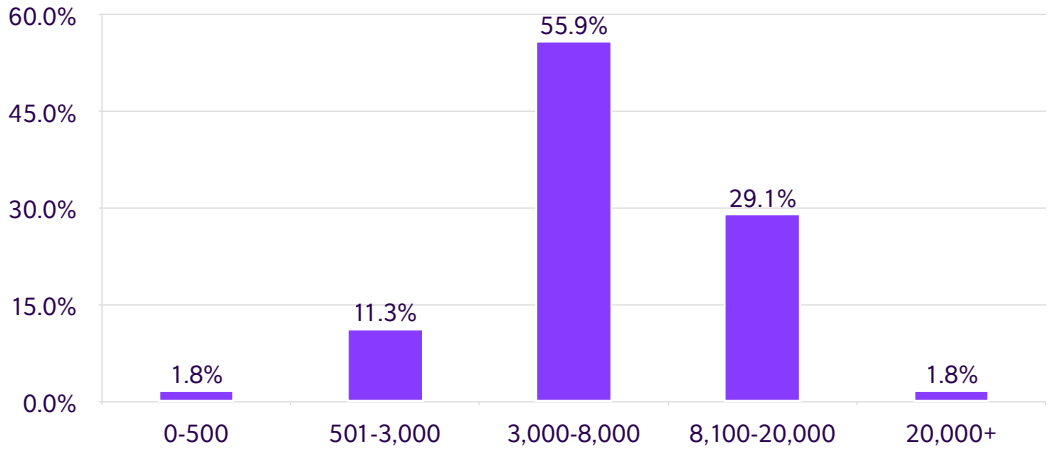


Figure 4.4: Respondents' monthly income

Level of Qualifications

With respect to the respondents' level of qualifications, Table 4.1 below indicates that slightly less than half (44.9%) held degrees. In comparison, 35.0% of the respondents were diploma holders, reflecting a substantial proportion of individuals with tertiary education levels. A smaller percentage (4.2%) had secondary education or lower qualifications.

Province	f	%
Copperbelt	190	19.1
Eastern	202	20.3
Luapula	203	20.4
Lusaka	193	19.4
Southern	207	20.8
Category of Respondents		
Teacher	791	79.5
Head teacher	77	7.7
Parent	89	8.9
Household	32	3.2
Other Specify...	6	0.6
Educational Qualification (highest):		
Never been to school	8	0.8
Primary	30	3
Secondary	42	4.2
Certificate	54	5.4
Diploma	348	35
Degree	447	44.9
Masters	59	5.9
Doctorate	1	0.1
Other, Specify...	6	0.6

Table 4.2: Province, Category respondents and education qualification

Findings: Respondent Perceptions

Perceptions of Real/ True Cost of Delivering Education for one student: School-Based Costs

School-Based Costs are expenses directly incurred by educational institutions.

Figure 4.5 shows the perception of residents in different areas (remote, rural, and urban) in Southern, Lusaka, Eastern, Luapula and Copperbelt Provinces regarding school-based costs in public schools. The survey found that the majority (76.6%) of respondents from all areas (urban, rural and remote) agreed that school-based costs are expenses directly incurred by educational institutions. Specifically, 75.7% of respondents in remote areas, 76.6% in rural areas, and 73.4% in urban areas agreed with this statement. However, there was also a notable percentage of respondents (16.9%) from remote areas, 17% from rural and 20.6% from urban areas who disagreed with this statement.

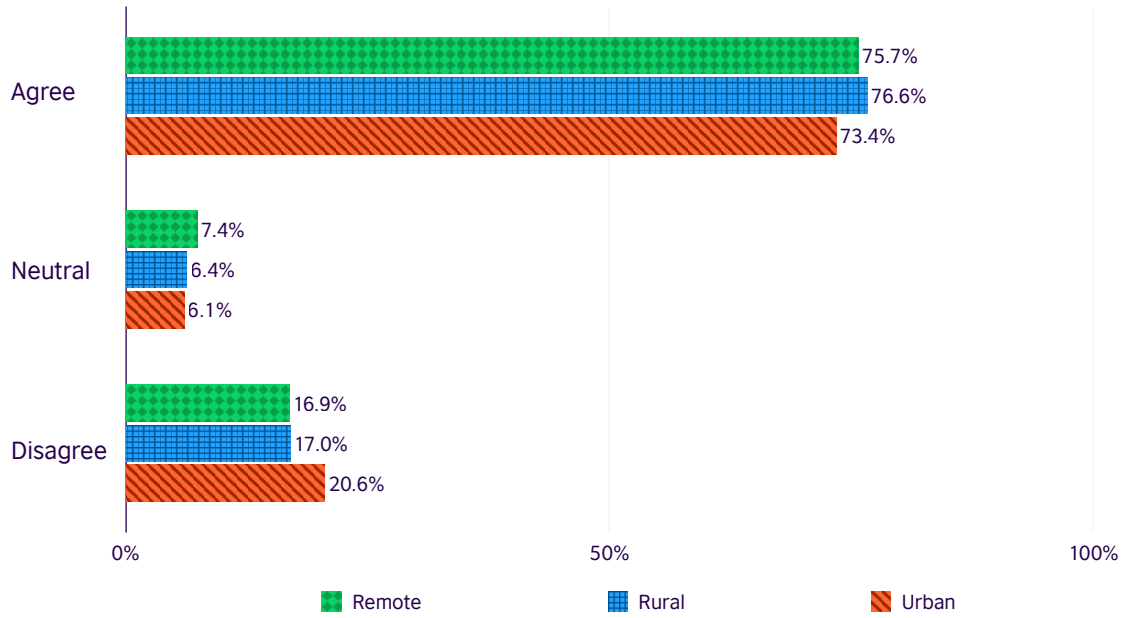


Figure 4.5: School-Based Costs are expenses directly incurred by educational institutions

The level of disagreement among respondents may stem from a lack of understanding or awareness of the true cost of education. However, while these are perceptions held by individuals in a study on the cost of educating a child in public school, the survey highlights a discrepancy between perception and

reality regarding school-based costs. Some respondents may not fully understand or appreciate the various costs associated with education, which could impact how they budget or plan for education expenses. Understanding these perceptions can help policymakers design more effective education policies. For example, if a significant portion of the population does not believe

If the school incurs school-based costs, there may be a need for better communication or transparency about education financing.

	1 = Strongly Disagree	2 = Disagree	3 = Neutral	4 = Agree	5= Strongly Agree	
I. Urban	18	53	21	150	103	345
	5.2%	15.4%	6.1%	43.5%	29.9%	100%
II. Rural	17	52	26	191	120	406
	4.2%	12.8%	6.4%	47%	29.6%	100%
III. Remote	10	31	18	108	76	243
	4.1%	12.8%	7.4%	44.4%	31.3%	100%

Table 4.3: School-Based Costs are expenses directly incurred by educational institutions

Across all groups, the highest percentage of respondents either agree or strongly agree that school-based costs are expenses directly incurred by educational institutions. Rural areas have the highest percentage of respondents who agree or strongly agree (76.60%), followed by Urban (73.33%) and Remote (75.81%). Remote areas have the lowest percentage of respondents who disagree or strongly disagree (16.88%), followed by Urban (20.14%) and Rural (17.00%). The majority of respondents across all groups perceive school-based costs as expenses directly incurred by educational institutions, with higher agreement levels in rural areas compared to Urban and Remote areas; however, a notable proportion of respondents in all groups express neutrality or disagreement with the statement.

Equally, the findings from the interviews indicate that the participants in rural, urban and remote areas were knowledgeable about what constitutes school-based costs. A policymaker interviewed echoed,

School-based costs include expenses for developing curriculum, constructing and maintaining classrooms, and acquiring teaching and learning materials, such as textbooks and instructional aids.

Participants comprehended that school-based costs are expenses schools incur to provide education services to learners. It is worth noting that participants from rural areas have a better understanding of school-related expenses compared to those from urban and remote areas. This understanding can lead to collaborations between parents and the government in financing education, based on a mutual understanding of the costs involved in educating a child.

Understanding the expenses of educating a child in school is of great importance. It helps parents, guardians, the government, and other stakeholders appreciate the effort required to educate a child in Zambia. This understanding would also strengthen the commitment of various stakeholders to the provision of quality educational services in Zambia and their appreciation of the cost-sharing model for financing education. It is concerning that a significant number of survey respondents expressed neutrality or disagreement regarding school-based costs. To address this issue, it is important to educate parents and stakeholders about the costs of educating a child in school. This will increase awareness about the challenges faced by the education system and help to improve it.

In the future, additional analysis could be carried out to understand whether there are disparities in perception based on socio-economic status or other factors. This information could be used to ensure that education policies are equitable and address the needs of all communities.

Furthermore, the findings in this study suggest a need for clearer communication about the breakdown of school-based costs. This could help parents and policymakers better understand the true cost of education and make informed decisions. In a lawmaker's own voice:

> **Although we have free education, there is nothing free, these days are not UBZ days where everything was free...**
>
> Member of Parliament, Lusaka

This goes to explain that the concept of free education in the policy is not fully appreciated as some feel there is nothing free.

Perceptions of different drivers of school-based costs

Infrastructure maintenance as a part of school-based costs

Respondent perceptions on whether school-based costs include infrastructure maintenance or not are presented in figure 4.6.

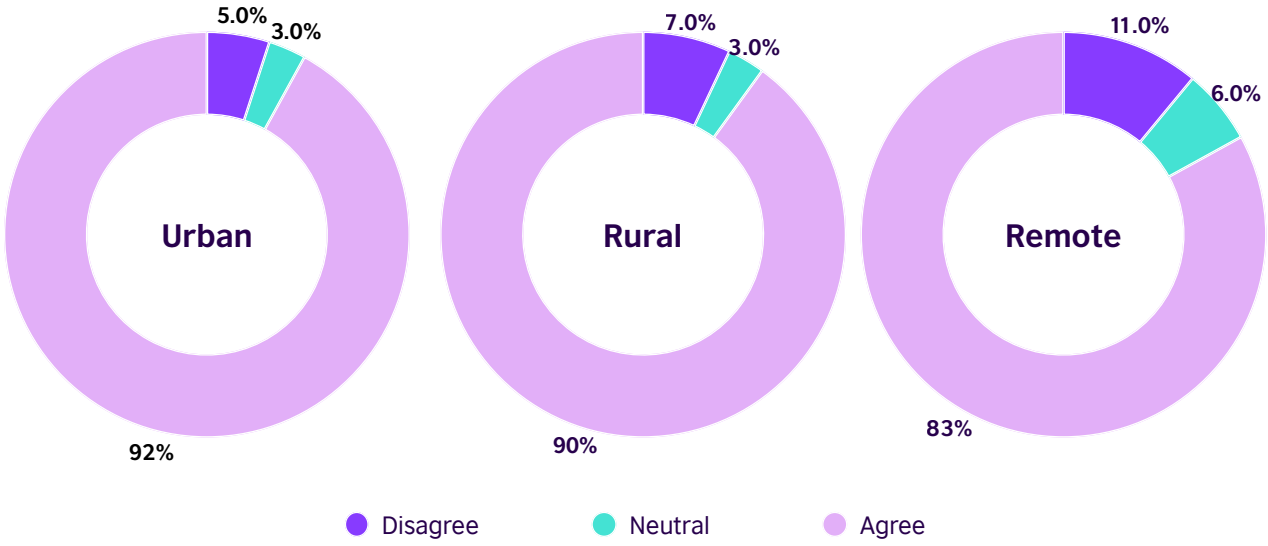


Figure 4.6: School-Based Costs include infrastructure maintenance

The study findings reveal interesting insights into the perceptions of respondents in different areas. The majority of respondents across all areas of spatial considerations agreed that school-based costs include infrastructure maintenance, with 92% in urban areas, 90% in rural areas, and 83% in remote areas expressing this view. This suggests that there is a general understanding that maintaining school infrastructure is a part of the cost of education. However, there is a notable percentage of respondents who disagreed or stayed neutral on this issue. In urban areas, 5% disagreed, while 3% stayed neutral. In rural areas, 7% disagreed, and 3% stayed neutral. In remote areas, 11% disagreed, and 6% stayed neutral. This indicates that there is some confusion or lack of clarity among these respondents regarding whether infrastructure maintenance should be considered a school- based cost.

Participants who were interviewed regarded infrastructure development as an expense related to the school. Furthermore, it was noted that infrastructure development is crucial to the provision of quality educational services.

One participant stated,

> **In my opinion, quality education is dependent on proper infrastructure development and maintenance. The government should take responsibility for building suitable infrastructures, such as classroom blocks and libraries. This cost is not only borne by the school but also by the government. Other stakeholders can also contribute by providing school requirements like water and sanitation, as well as infrastructure that supports the feeding program...**
>
> Policy Maker, Chadiza district

	1 = Strongly Disagree	2 = Disagree	3 = Neutral	4 = Agree	5= Strongly Agree	
I. Urban	7	11	10	187	130	345
	2%	3.2%	2.9%	54.2%	37.7%	100%
II. Rural	3	27	11	213	152	406
	0.7%	6.7%	2.7%	52.5%	37.4%	100%
III. Remote	6	21	15	108	93	243
	2.5%	8.6%	6.2%	44.4%	38.3%	100%

Table 4.7: School-Based Costs include infrastructure development.

Teachers' Salaries as School-Based Cost

Participants were also asked to assess whether school-based costs include teachers' salaries. Table 4.13 presents the findings from the quantitative data.

	1 = Strongly Disagree	2 = Disagree	3 = Neutral	4 = Agree	5= Strongly Agree	
I. Urban	55	102	15	108	65	345
	15.9%	29.6%	4.3%	31.3%	18.8%	100%
II. Rural	66	136	20	108	76	406
	16.3%	33.5%	4.9%	26.6%	18.7%	100%
III. Remote	35	95	8	68	37	243
	14.4%	39.1%	3.3%	28%	15.2%	100%

Table 4.8: School-Based Costs include teacher salaries

Across all groups, the highest percentage of respondents who agree or strongly agree that school-based costs include teacher salaries is in Urban areas (50.14%), followed by Rural (45.34%) and Remote (43.21%). Rural areas have the highest percentage of respondents who disagree or strongly disagree (50.76%), followed by Remote (53.50%) and Urban (48.51%) areas. Neutral responses are relatively low across all groups, indicating that respondents generally have a clear stance on the statement. Perceptions of whether school-based costs include teacher salaries vary across groups, with higher agreement in Urban areas than in Rural and Remote areas. However, a notable proportion of respondents across all groups disagree with the statement, suggesting some ambiguity or disagreement regarding this aspect of school funding.

Qualitative data reveal mixed views on whether teachers' salaries should be considered school-based costs, with some participants viewing them as government expenses rather than school costs. A CSO representative had this to say,

> **Salaries for public school teachers are solely the government's responsibility and cannot be considered a direct expense of the school. However, schools can pay the salaries of teachers who have been engaged under a Parent.**
>
> Teacher Association (PTA) contract

A parent interviewed had the following views,

> **Teachers are motivated to teach our children because of the salary they are paid. Even though the government covers this expense, teachers' salaries are school-related costs...**
>
> Parent KII

Based on both qualitative and quantitative data, it remains uncertain among participants whether teacher salaries should be considered school-based costs.

Curriculum and Material Development as School-Based Cost

Participants were asked to determine whether school-based costs include curriculum development. Figure 4.7 presents the findings.

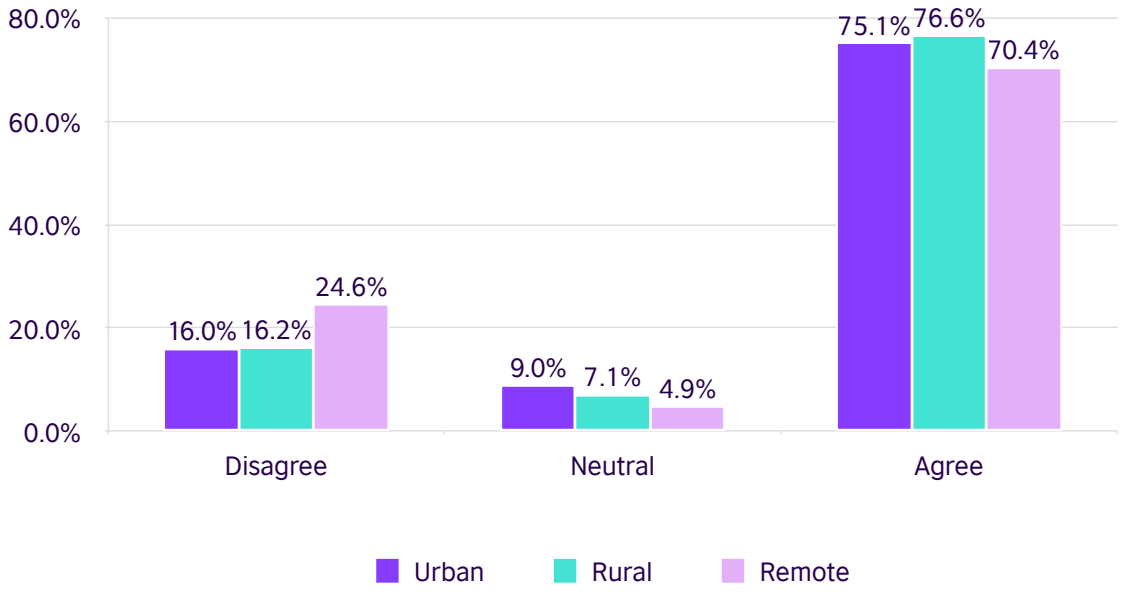


Figure 4.7: School-Based Costs include curriculum development

Across all groups, the highest percentage of respondents who agree or strongly agree that school-based costs include curriculum development is in the Urban areas (75.08%), followed by Rural (76.60%) and Remote (70.37%) areas. Remote areas have the highest percentage of respondents who disagree or strongly disagree (24.69%), followed by Rural (16.26%) and Urban (15.94%) areas. Neutral responses are relatively low across all groups, indicating that respondents generally have a clear stance on the statement.

Most respondents across all groups perceive curriculum development as part of school-based costs, with higher agreement levels in Urban and Rural areas than in Remote areas. However, there is a notable proportion of respondents in all groups who disagree with the statement, indicating some level of ambiguity or disagreement regarding this aspect of school funding.

One KII respondent shared that:

> **...For some of us who take our children to public schools, the government has recruited teachers, and now new infrastructure is being built. We are no longer involved in Public Private Partnership in the face of Free Education...**
>
> Parent KII

This suggests that while the majority understood and agreed that school-based costs include curriculum development, a significant minority do not share this perspective.

General Observations: Perceptions of school-based costs

These findings further suggest a need for better education and communication about the breakdown of school-based costs. If a significant portion of the population is unsure or disagrees about whether infrastructure maintenance is included in school-based costs, this could impact budgeting and planning for education expenses. It could also suggest a need for more transparent accounting practices in education to ensure that stakeholders clearly understand all costs. For policymakers and educators, these findings highlight the importance of clear communication about the true cost of education. Understanding the population's perceptions can help tailor policies and initiatives to address misconceptions or gaps in understanding. Additionally, it may be important to consider how perceptions vary across different demographic groups to ensure that policies are equitable and inclusive. Overall, the study findings suggest that while there is a general understanding that school-based costs include infrastructure maintenance, there are still some gaps in perception that need to be addressed. This could have implications for how the true cost of educating a child in a public school is understood and managed. A more structured planning and communication remain key to resolving this challenge.

Perceptions on Household-Based Costs

This question was used to assess the extent to which respondents understood that household-based costs required to support a learner's education are borne by individual families/households. Data gathered is consolidated in Figure 4.8.

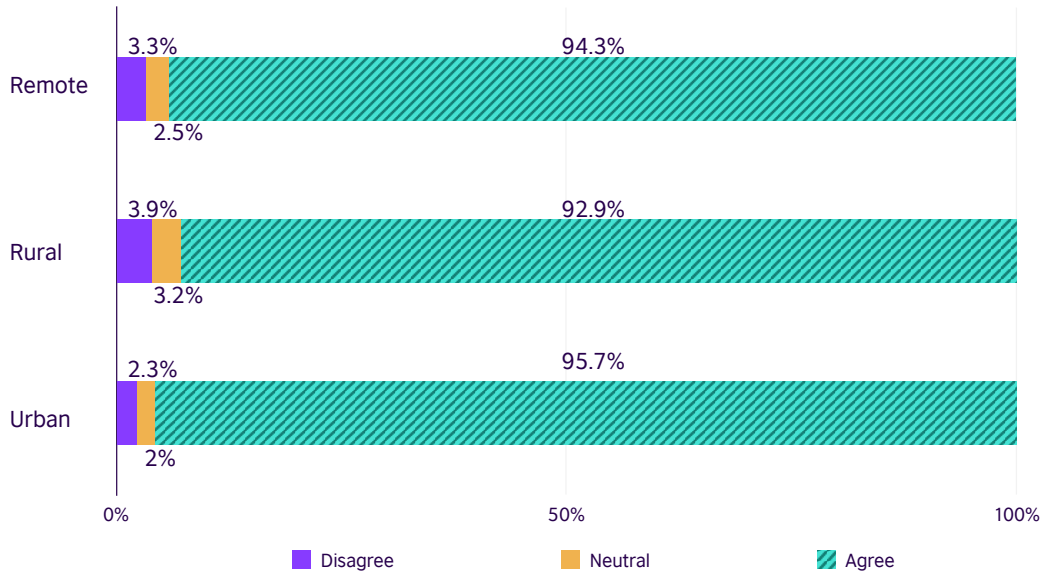


Figure 4.8: Household-Based Costs include expenses borne by households to support a child's education

Study findings in Figure 4.11 below show that, in remote areas, 94.3% of respondents agreed that these costs include household education expenses, slightly lower than the agreement rates of 95.7% in urban areas and 92.9% in rural areas. This indicates a strong overall understanding, but slightly lower clarity in remote regions. On the other hand, a small percentage of respondents disagreed with the definition. In remote areas, 3.3% disagreed, compared to 3.2% in rural areas and 2.3% in urban areas. While these percentages are low, they highlight a need for clarification or education on the concept among a minority of the respondents.

Additionally, a small percentage of respondents remained neutral. In remote areas, 2.5% were neutral, compared to 3.2% in rural areas and 2% in urban areas. This neutrality suggests a lack of clarity or understanding among some respondents, which is concerning, given the expectation that households should understand the costs of educating their children. Overall, the findings indicate a generally strong understanding of household-based education costs, with some variation and a lack of clarity in remote and rural areas. To address this, efforts may be needed to provide clearer information and education on these costs, particularly in regions where understanding appears to be less clear.

Supplementary Learning Materials

Figure 4.9 examines the levels of agreement on whether household-based costs should include supplementary learning materials.

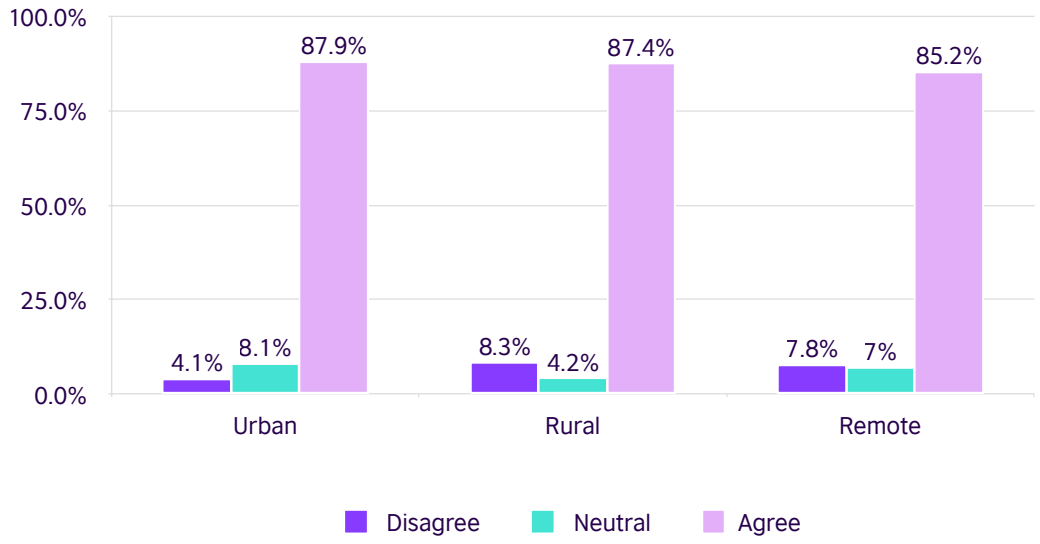


Figure 4.9: Household-Based Costs include supplementary learning materials

The findings revealed a high level of agreement across all regions: 87.9% of urban respondents, 87.4% of rural respondents, and 85.2% of remote respondents agreed that these costs should include such materials. A small percentage of respondents disagreed with this notion: 4.1% of urban respondents, 8.3% of rural respondents, and 7.8% of remote respondents held this view. Additionally, 8.1% of urban respondents, 4.2% of rural respondents, and 7% of remote respondents chose to remain neutral.

These findings have several implications. Firstly, the high level of agreement suggests a common understanding among respondents that household-based costs should include supplementary learning materials. This understanding is crucial for policymakers and educators to ensure that households are adequately supported in providing these materials for their children's education. Secondly, the differences in agreement levels across regions, particularly the higher rates of disagreement and neutrality in rural and remote areas, highlight the need for targeted interventions in these regions. Efforts should be made to increase awareness and understanding of household-based costs, including supplementary learning materials, to ensure equitable access to educational resources across all regions.

> **From where I stand, when I hear that there is free education, I am not expected to be paying more in terms of buying more learning materials for my child as these must be found in schools provided by the government; otherwise, it is not free but cost-shared education as it was before...**
>
> Parent KII

Uniforms and Transportation

Figure 4.10 examines the levels of agreement on whether household-based costs include uniforms and transportation.

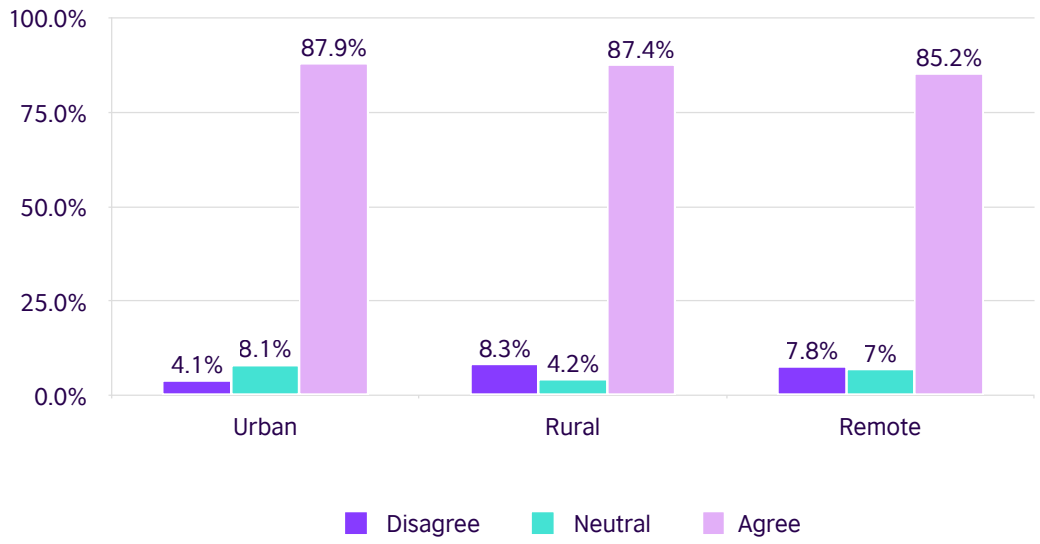


Figure 4.10: Household-Based Costs include uniforms and transportation

Figure 4.10 assessed understanding of household-based costs related to children's education, with a particular focus on expenses such as uniforms and transportation. The results revealed a striking consensus among respondents across urban, rural, and remote areas, with the vast majority agreeing that these costs are indeed part of household-based expenses. In urban areas, 95.1% of respondents acknowledged the inclusion of uniforms and transportation, reflecting the sentiment in rural (94.3%) and remote (95.1%) regions.

On the other hand, dissenting voices were minimal, with only a small fraction of urban (2.3%), rural (4.7%), and remote (2.8%) respondents expressing disagreement. Additionally, a marginal percentage of urban (2.6%), rural (1%), and remote (2.1%) respondents adopted a neutral stance. These findings underscore a deep-seated awareness among participants of the nature of household-based costs, recognising uniforms and transportation as important components of child education. This recognition extends beyond the framework of free education, highlighting the enduring financial responsibilities shouldered by parents and households.

This was supported by a parent's own voice during a key informant interview as follows:

> **We parents are still burdened in this era of free education in that we have to look for money to support our children in terms of transport, food and other essential materials which make learners go to school...**
>
> Parent KII

When asked about household-based costs, some parents do not realise that they are still paying more under the guise of free education, while others realise this and indicate that they are 'burdened'.

Perceptions on the link between School-level Investment & Quality of Education

This section presents study findings on perceptions of school-level investment and quality education in the study's target provinces. The analysis presented in this section focuses on the quantitative responses from the questionnaire and qualitative interview responses from various stakeholders.

The quality of education depends on school-level investment.

Study findings in Table 4.9 below show that among urban residents, more than two quarters (45.46%) of the respondents agreed or strongly agreed to the statement that 'quality education is dependent on school level investment'. Among Rural residents, nearly half (48.53%) of respondents agreed or strongly agreed. Among Remote residents, a quarter (41.98%) of the respondents agreed or strongly agreed.

Disagreement levels are relatively low across all residence groups. Neutral responses are absent in all residence groups. The majority of respondents across all residence groups perceive that the quality of education depends on school-level investment, with the highest agreement observed in rural areas, followed closely by urban areas and then Remote areas. The findings indicate a consensus that investment in schools plays a significant role in determining the quality of education. A strong consensus that the quality of education depends on school-level investment, with over 89% agreement across all areas, indicates widespread understanding of the importance of financial resources for learning outcomes. Similarly, interviews with stakeholders, including the Ministry of Education, the members of parliament and Civil Society Organisations, share the same perception.

You can have as many children as you can in a classroom, but if there are no desks, books and a clean environment, children cannot learn. Therefore, quality education is very important, where you have everything in place that supports learning.

Parent KII

	1 = Strongly Disagree	2 = Disagree	3 = Neutral	4 = Agree	5= Strongly Agree	
I. Urban	1	22	14	143	165	345
	0.3%	6.4%	4.1%	41.4%	47.8%	100%
II. Rural	10	25	9	188	174	406
	2.5%	6.20%	2.2%	46.3%	42.9%	100%
III. Remote	3	16	12	90	122	243
	1.2%	6.60%	4.9%	37%	50.2%	100%

Table 4.9: Quality of Education dependent on School-level Investment

The study finding also concurs with earlier studies conducted in Zambia by the World Bank (World Bank Group 2015), which reported that quality education is high when schools are well-resourced with inputs such as highly qualified teachers, teaching and learning materials, infrastructure, and a relevant curriculum. In addition, interviews with the Key Informant showed that:

Parameters that define the quality of Zambia's education have been based on National Assessment Survey examination scores of learners, completion rates, survival rates to Grade 5 examination pass rates, pupil book ratios, pupil classroom ratios, sufficient desks, contact hours, clean, secure environment, availability of water and sanitation facilities and sanitary pads for girls. All these require funding; hence, they are taken into account when calculating the investment required at the school level...To conduct assessments, schools require paper, toner, and printers to print tests.

Key informant interview 2024

This statement reinforces the findings of UNESCO's commissioned desk study on pedagogical practices in Zambian Primary Schools (2019), which outlined similar parameters for defining the quality of education.

Investment in Infrastructure is critical for quality education.

Table 4.10 below shows that among urban residents, the majority (96.52%) agreed

or strongly agreed with the statement that infrastructure investment is critical to the provision of quality education. Among rural respondents, the majority (93.84%) agreed or strongly agreed with the statement on the importance of quality, child-friendly infrastructure. In comparison, the majority (95.07%) of remote respondents also responded in the affirmative. Disagreement levels were relatively low across all respondents from urban, rural and remote areas. Neutral responses were minimal across all residence groups. The overwhelming majority of respondents across all residence groups either agreed or strongly agreed with the statement, indicating a widespread consensus regarding the critical.

The importance of infrastructure investment for quality education provision. The study findings from the Key Informants' interviews with both the government and Civil Society also indicated affirmative responses. One respondent, for example, reported the following:

While access to school is important, the quality of the education provided is even more important. For quality education to take place, one of the key requirements is infrastructure, just like the number of teachers and learning materials. The relevant infrastructure conducive to learning is even more important to enable learners to learn more effectively and achieve good results.

Key informant interview 2024

In the interview with the Key Informants and CSOs, it was reported that one of the key infrastructures necessary for improving quality education at the school is ensuring that schools have facilities that cater for children with SEN, such as handrails. One respondent, for example, reported the following:

> **While the cost for improving infrastructure may be high, it is important to note that the government has taken a keen interest to ensure that schools improve the water and sanitation for the schools, transform the old infrastructure to accommodate learners with special needs and provide sanitary pads and wash basins in all washrooms, especially girls' washrooms. This has been made possible through partnering with the private sector.**
>
> Key informant interview 2024

> **The lack of wash facilities in the infrastructure causes girls to miss school for 2 to 3 days every month. Thus, investing in infrastructure such as washrooms, adequate toilets, and pad disposal bins encourages girls to attend schools.**
>
> Key informant interview 2024

FGDs with learners also report that infrastructure is key to providing quality education. This finding concurs with earlier studies conducted by the ZESSTA activity (2019) in collaboration with the Ministry of Education, which revealed that learners were particularly bothered by poor toilets, insufficient desks and chairs, and broken windows and doors. These ranked highest among the factors that bothered learners most in school, pointing to the need for clean toilets and running water, sufficient desks and chairs, and well-maintained school infrastructure.

	1 = Strongly Disagree	2 = Disagree	3 = Neutral	4 = Agree	5= Strongly Agree	
I. Urban	3	5	4	134	199	345
	0.9%	1.4%	1.2%	38.8%	57.7%	100%
II. Rural	8	15	2	178	203	406
	2%	3.7%	0.5%	43.8%	50%	100%
III. Remote	1	6	5	83	148	243
	0.4%	2.5%	2.1%	34.2%	60.9%	100%

Table 4.10: Infrastructure Investment at the school level

Teacher Salaries and Remuneration are Critical for Quality Education

Findings in Table 4.11 below show that among urban residents, the majority (93.91%) of respondents agreed or strongly agreed with the statement that teachers' salaries and remuneration are critical to quality education. Among rural residents, the majority (91.13%) of the respondents agreed or strongly agreed with the statement. Similarly, the majority of the remote residents (90.53%) agreed or strongly agreed with the statement. As with findings reported above, disagreement levels are relatively low across all residence groups. Neutral responses were minimal across all residence groups. It is therefore evident from the findings that the overwhelming majority of respondents across all residence groups either agreed or strongly agreed with the given statement. This suggests a widespread consensus among respondents that supports the notion expressed in the statement.

When triangulating the findings with the perceptions presented during interviews with Key informants, including head teachers, opinion leaders, CSOs, FBOs, parliamentarians and government officials, the findings are similar. Participants in the interviews reported the following:

A good salary and good conditions of service not only motivate teachers to work hard but also encourage them to deliver quality education by ensuring that learners are taught, assessments are given, and all learners are integrated into the teaching. However, when these are absent, teachers abscond from work to earn money elsewhere, leaving learners without a teacher.

Other Key informants reported the following:

> **Teachers' salaries and good accommodation with electricity and running water motivate teachers to provide quality education.**
>
> **A good salary and remuneration are important for teacher motivation. Hence, all teachers on lower salary scales should be upgraded immediately after they have upgraded their qualifications, as Kenya does.**
>
> Key informant interview 2024

With respect to investing in teacher accommodation, it's noteworthy that teachers' poor living conditions not only affect their well-being but also their ability to provide quality education to their students. Inadequate accommodation can also lead to stress, fatigue, and health problems, which can impact the teacher's productivity and effectiveness in the classroom. One of the Key Informants summed it up well by stating the following:

Teachers who are not adequately housed may also be more likely to abandon their teaching posts or seek employment opportunities elsewhere, which can lead to a shortage of teachers in the country, hence compromising the quality of education provided to learners .

Key informant interview 2024

	1 = Strongly Disagree	2 = Disagree	3 = Neutral	4 = Agree	5= Strongly Agree	
I. Urban	6	10	5	75	249	345
	1.7%	2.9%	1.4%	21.7%	72.2%	100%
II. Rural	8	16	12	138	232	406
	2%	3.9%	3%	34%	57.1%	100%
III. Remote	6	9	8	49	171	243
	2.5%	3.7%	3.3%	20.2%	70.4%	100%

Table 4.11: Teachers Conditions of Service

Curriculum Development and availability of materials

Table 4.12 below presents findings on curriculum development and availability of materials, which are key investments to quality education. Findings reveal that among Urban residents, the majority (95.94%) of respondents agreed or strongly agreed that curriculum development and the availability of teaching and learning materials are key investments for quality education. Among Rural residents, nearly all (97.04%) of the respondents agreed or strongly agreed with the statement. Among Remote residents, almost all (98.35%) of the respondents agreed or strongly agreed with the statement. Respondents who disagreed with the statement were extremely low across all residence groups. Neutral responses were present in minimal numbers across all residence groups. The overwhelming majority of respondents across all residence groups strongly agreed that curriculum development and availability of materials are key investments for quality education. This indicates a widespread perception that a good, relevant curriculum, supported by the availability of teaching and learning materials, is a key investment in quality education.

	1 = Strongly Disagree	2 = Disagree	3 = Neutral	4 = Agree	5= Strongly Agree	
I. Urban	3	3	8	122	209	345
	0.9%	0.9%	2.3%	35.4%	60.6%	100%
II. Rural	5	3	4	161	233	406
	1.2%	0.7%	1%	39.7%	57.4%	100%
III. Remote	0	1	3	80	159	243
	0%	0.4%	1.2%	32.9%	65.4%	100%

Table 4.12: Curriculum Development and Availability of Teaching and Learning Materials

There was convergence in the responses from the quantitative survey and the qualitative interviews conducted with various stakeholders, including parliamentarians, government officials, and Civil Society Organisations, on the importance of investing in curriculum development and teaching and learning materials to improve the quality of education provision. One respondent, for example, reported the following:

> **A good curriculum that is anchored on the aspirations of the society is a critical investment for a nation. I see the curriculum as a stand-alone statutory board, rather than as part of the directorates in the Ministry, as it is now. It is important to invest in the school-level curriculum so that learners who graduate from these schools find the subjects they studied relevant even in the world of work.**
>
> Key informant interview 2024

Perceptions on Involvement of Other Stakeholders

The study aimed to understand perceptions on the involvement of local communities and the private sector in education financing to reduce financial burdens on households.

The study revealed that the majority of respondents agreed that private-public partnerships and other support mechanisms could contribute positively to education financing at the community level.

1. **Parent and Community Participation:** There was a recognition of the importance of parent and community involvement in supporting schools. This included participating in decision-making processes, contributing to infrastructure development, and maintaining school facilities.
2. **NGO and Donor Support:** NGOs and donors were highlighted as important contributors to school-level investment, particularly in infrastructure development and resource provision. This included building classrooms, toilets, and desks, as well as supplying handwashing drums and soap, and providing bursaries for students and sponsorship programmes, investing in feeding programmes, supplying books and materials, and capacity-building for communities to raise resources from various sources.
3. **Focus on Infrastructure and Resources:** A recurring theme was the importance of investing in infrastructure, such as classrooms, toilets, and desks, to create conducive learning environments. Additionally, there was an emphasis on providing essential resources, including learning materials and support programs such as feeding initiatives, to enhance students' educational experience. There was a need to tap into the Constituency Development Fund (CDF) for capital investment.
4. **CSR Policy:** it was stated that the Private Sector were seated at the table, and there was a need to put in place a compelling policy for Corporate Social Responsibility for the Private Sector. It was recommended that the private sector could potentially support capital investment into infrastructure, school supplies such as desks, teaching and reading materials and sanitation facilities.

Findings of these questions are disaggregated as follows:

Among males, approximately 66.99% agreed or strongly agreed that “local communities and private sector participate to ensure that costs are managed for vulnerable learners through feeding programmes.” Among females, approximately 73.79% agree or strongly agree. Both gender groups had relatively low percentages of respondents who disagreed or strongly disagreed with the statement (around 27% or less). Neutral responses were relatively low across both genders. The majority of respondents across both gender groups perceived that local communities and the private sector participated in managing costs for vulnerable learners through feeding programs, with slightly higher agreement levels among females. There was consensus that these entities played a role in supporting vulnerable learners through such programs.

The analysis of survey responses regarding the involvement of local communities and the private sector in managing costs for vulnerable learners through feeding programs, provision of school materials and infrastructure, and the viability of private-public partnerships (PPPs) reveals significant trends. For the first question, a large majority of both male (66%) and female (73.8%) respondents agree or strongly agree that local communities and the private sector can contribute to managing costs for vulnerable learners through feeding programs, with a statistically significant association between gender and responses ($\chi^2 = 28.89$, $p < 0.001$). Similarly, for the provision of school materials and infrastructure, significant majorities of both genders (male: 92.6%, female: 91.6%) agree or strongly agree that other players can contribute, with gender also showing a significant association with responses ($\chi^2 = 12.67$, $p = 0.013$). Regarding the suitability of PPPs for the private sector, a majority of both male (89.7%) and female (88.5%) respondents agree or strongly agree, with a statistically significant association between

gender and responses ($\chi^2 = 9.85$, $p = 0.042$). These findings underscore widespread support for community and private sector involvement in education-related initiatives, highlighting gender differences in perceptions and attitudes towards these strategies.

	1 = Strongly Disagree	2 = Disagree	3 = Neutral	4 = Agree	5= Strongly Agree
Local communities and the private sector participate to ensure that costs are managed for vulnerable learners through feeding programmes					
Male	46	70	22	175	105
	11.00%	16.70%	5.30%	41.90%	25.10%
Female	43	76	32	235	190
	7.50%	13.20%	5.60%	40.80%	33.00%
Other players can provide School materials and infrastructure.					
Male	5	16	10	203	184
	1.20%	3.80%	2.40%	48.60%	44.00%
Female	7	24	17	287	241
	1.20%	4.20%	3.00%	49.80%	41.80%
Private Public Partnership is a good option for the private sector.					
Male	5	14	24	215	160
	1.20%	3.30%	5.70%	51.40%	38.30%
Female	5	17	44	333	177
	0.90%	3.00%	7.60%	57.80%	30.70%

Table 4.13: Involvement of other Stakeholders in school costs

There was a strong alignment between the qualitative and quantitative data regarding the agreement towards involvement of other stakeholders across the three parameters: local communities and the private sector participate to ensure that costs are managed for vulnerable learners through feeding programmes; other players could provide school materials and infrastructure; and the Private Public Partnership was a good option for the private sector. The overall perception from participants across genders and spatial considerations was that other stakeholders needed to take an active role to support financing the cost of education. Other stakeholders were perceived as a strategic partner, which could provide non- traditional government funding and supplement direct budget support.

Findings: Costing Exercise

Criteria for Allocation of Funds to Schools

It was found that the government considers four parameters when allocating funds to schools:

- The type of the school (Boarding or Day School) is considered. Boarding schools receive more than day schools because there is feeding throughout the term, maintenance of dormitories and beds, and ablution blocks.
- Enrolment levels are considered. The total number of boys and girls in the schools (this does not disaggregate but only looks at the overall school population). Super grade one (1) with a population of more than 1000 learners gets more than a grade three (3) school.
- Distance from the DEBS office (schools further away from DEBS receive more money. The fourth factor is the foundation amount given to all schools (60% of the allocation is the foundation amount, 40% takes into account the parameters outlined.

Types of Funding

There are three ways in which the government funds schools in Zambia: via free general education, through school grants that provide a top-up for orphans and vulnerable children (OVC), and via additional thermal grants targeting schools not connected to the electrical grid.

Under the free education policy, the government disburse six hundred kwacha (K600) per year for each child, which is translated into two hundred kwacha (K200) per child per term. However, schools are funded on a quarterly basis by the Ministry of Finance, meaning that the budget allocation per child per quarter is K162.50 multiplied by enrolment (number of learners per school).

Another type of funding is a school grant. The MOE uses a formula (add the enrolment factor, distance from the DEBS office, and boarding/day school dichotomy). The government also fund schools according to the number of Orphans and Vulnerable Children (OVC). The ministry collects statistics about OVCs from the provinces.

The government also disburse what is called a Thermal grant (for schools not connected to the national grid). These schools use generators as a power source. The grant is used to buy fuel to run generators and to repair and maintain them. During the interviews, it was discovered that sixteen schools receive thermal grants.

Guidelines for Utilisation of Funds in Schools under the Free Education Policy

Table 4-16 shows the stipulated guidelines for the utilisation of funds in secondary schools under the Free Education Policy. The school grant is divided into two categories (MOE, 2023). The 50 per cent of the funds disbursed in schools is allocated to free secondary education and includes cost components such as teacher education and specialised services.

education standards, assessment and evaluation, curriculum and material development, co-curriculum, open and distance learning and infrastructure development. 10% is allocated to teacher education and specialised services; 15% to education standards, assessment, and evaluation; 30% to curriculum and material development; 25% to Co-curriculum; 5% to open and distance learning; and 15% to infrastructure development. The 50 % goes towards management and support services. In this category, 60% is allocated to human resources and administration, 10% to financial management, 5% to procurement and 25% to policy, planning, coordination and equity. The table next provides a summary:

Secondary School Grant for Free Secondary Education	
Secondary Education (50%)	
Cost Component	**Allocation by (%)**
Teacher education and specialised services	10
Curriculum and Material Development	30
Education standards, assessments and evaluation	15
Co-Curricular Activities	25
Open distance and learning	5
Infrastructure development	15
Programme Total	**100%**
Management and Support Services (50%)	
Human resources and administration	60
Financial Management-Accounting	10
Procurement management	5
Policy, planning, coordination, and equity	25
Programme Total	**100%**
Grand Total	**(50%+50%)= 100%**

Table 4.14: Guidelines for Utilisation of Funds in Schools under the EFA policy – Secondary Education | Source: Ministry of Education (2023)

Table 4-10, as stipulated in the guidelines for the utilisation of funds in primary schools under the Free Education Policy, divides the school grant into two categories (MOE, 2023). The 50 per cent of the funds disbursed in schools is allocated to free primary education. It includes cost components such as teacher education and specialised services, education standards, assessment and evaluation, curriculum and material development, co-curriculum, open and distance learning, and infrastructure development. 15% is allocated to teacher education and specialised services; 15% to education standards, assessment, and evaluation; 25% to curriculum and material development; 25% to Co-curriculum; 5% to open and distance learning; and 15% to infrastructure development. The 50 % goes towards management and support services. In this category, 60% is allocated to human resources and administration, 10% to financial management, 10% to procurement and 20% to policy, planning, coordination and equity. The table below provides a summary:

Primary School Grant for Free Primary Education	
Secondary Education (50%)	
Cost Component	**Allocation by (%)**
Teacher education and specialised services	15
Curriculum and Material Development	25
Education standards, assessments and evaluation	15
Co-Curricular Activities	25
Open distance and learning	5
Infrastructure development	15
Programme Total	**100%**
Management and Support Services (50%)	
Human resources and administration	60
Financial Management-Accounting	10
Procurement management	10
Policy, planning, coordination, and equity	20
Programme Total	**100%**
Grand Total	**(50%+50%)= 100%**

Table 4.15: Guidelines for Utilisation of Funds in Schools under the EFA policy – Primary Education | Source: Ministry of Education (2023)

Understanding School-Based Costs

The education financing system in Zambia follows a cost-sharing model. This means that educating a child involves two types of costs: school-based costs, which the school itself incurs, and household-based costs, which include direct expenses borne by the child's parents or guardians. This section establishes the agreed understanding of school-based costs by identifying the different types of expenses involved. This section discusses the costs associated with the free education policy and their impact on household costs, as well as gender-based expenses.

Teaching and Professional Staff Salaries

In the 2023 GRZ budget, K15.2 billion (75.11 per cent) was meant for the payment of Personal Emoluments. The funds were used to pay salaries to members of staff of the Ministry of Education-Headquarters, officers under the Provincial Education Administration, officers under the District Education Administration, and teachers.

Infrastructure Development and Maintenance

Overall, infrastructure plays a crucial role in creating an environment conducive to effective teaching and learning. According to MOE (2021), infrastructure development involves infrastructure maintenance, rehabilitation and construction of classrooms, dormitories, teachers' houses, offices, laboratories, drainage, water, tanks, water pipes, landscaping, maintenance of lawns, desks, and other school furniture; and any other activity relating to school maintenance. Schools are entrusted with the responsibility to not only construct classrooms but also to ensure that any damaged equipment is repaired promptly.

Schools are also tasked with securing resources to maintain classroom blocks, install office fittings, and handle electrical items such as bulbs and wiring. Carrying out such repairs and maintenance incurs substantial expenses, as it includes the purchase of required items and payment for labour costs.

Curriculum and Materials Development

A strong curriculum is critical to the delivery of quality education. Although curriculum development is a national-level task, schools need to participate in consultative meetings conducted by the Curriculum Development Centre (CDC) to ensure that it fully reflects the needs of students across the country. In doing so, they incur costs, such as transportation and other logistical arrangements for the selected teachers. Additionally, schools organise Professional Continuous Development (CPD) meetings to address issues arising from subject syllabi, which is part of curriculum development.

1. **Education Standards, Assessments, and Evaluation**

In Zambia, it is common for schools to conduct mandatory assessments every month and at the end of each term as a part of their accountability processes. These assessments, whether in the form of termly, weekly, or monthly tests or mock exams, are intended to enhance institutional practices and improve pupils' overall academic performance (Mulenga-Hagane et al., 2019). Schools have to bear the expenses of purchasing paper, photocopiers, and printers for printing assessment papers. In rural areas with no electricity or erratic supply, and no printing or photocopying facilities, schools have to pay for transportation to send their teachers to towns where they can access these facilities. Therefore, assessment costs are considered as a part of the expenses incurred by schools. The MOE (2021) further indicates that this school-based cost includes sports equipment and attire; co-curricular affiliations (DEBS, PEO, and HQ); allowances for various co-curricular activities; and first-aid kits. Besides that, it includes awards for hostel and classroom inspections, JETS expenses (JETS fair materials and logistics, quiz logistics, Olympiads logistics), examination expenses, and any other expenses related to Standards and Assessment.

2. **Teacher Education and Specialised Services**

Teacher education is of great significance in the quest to educate a child in Zambia. This school-based expenses include, inter alia, institutional affiliation to all subject associations and professional associations, logistics for teachers to attend subject association meetings (national, provincial and district levels), Logistics for planning and attending CPD meetings and refreshments for School-Based Continuous Professional Development (SBCPD) meetings, and any other activities related to teacher Education (MOE, 2021).

3. **Human Resource and Administration**

In addition to hiring teachers, schools in Zambia also employ non-teaching staff such as office orderlies, cleaners, gardeners, and plumbers. These individuals play a vital role in supporting the education process for children at school. However, schools are required to provide them with either a salary or an allowance for the work they perform at the school. In addition to teacher expenses, the cost of non-teaching personnel is also considered part of the school-based costs. In addition, human resources and administration include wage bills, NAPSA, ZRA, paying of gratuity, and leave days, medical certifications expenses for workers, motor vehicle expenses, general administrative expenses and allowances. Furthermore, it includes stationary, cleaning materials, COVID 19 materials, commemoration of National Days, and Hospital bills/ transport for learners, equipment for entertainment for learners, DSTV subscriptions, loading and offloading, Non-personal emoluments; and

purchase of attendance registers, exam registers, Educational and administrative costs such as exchange visits and travel to zone centres by Teachers and the school management (MOE, 2021).

Ensuring staff motivation is crucial for providing quality education. Demotivated teachers may not be fully committed to their work. In addition to their salaries, schools may also reward hard-working teachers during International Teachers' Day and International Labour Day. Schools purchase items such as fridges, stoves, and mattresses for deserving teachers. Normally, the government, not the school, should appreciate its teachers for their hard work and dedication. However, this cost falls on the school.

4. Financial Management and Audit

School-based costs also include expenses for financial management and auditing. The school needs to procure accountable documents and pay banking expenses, as well as logistics for expenditure on finance meetings. In addition, it includes logistics for the collection of accountable documents, audit expenses, and any other activity relating to financial management (MOE, 2021).

5. Extracurricular Activities

Extracurricular activities play a vital role in a child's development. Therefore, schools organise activities such as sports, drama, school clubs, basketball, and baseball to keep pupils active and help them acquire new skills. However, schools are required to procure sports equipment, such as uniforms and balls, and to prepare sports fields for extracurricular activities. These are expenses that schools incur and are part of the school-based costs. It is important to note that these costs are incurred by all schools, regardless of whether they are located in rural, urban, or remote areas.

6. Procurement Management

Transport expenses are a direct cost incurred by schools in Zambia. Most schools in the country face transportation challenges. Schools without transportation have to rely on public transportation to purchase teaching and learning materials such as chalk, paper, dusters, erasers, and other items essential to the teaching and learning process. On the other hand, schools that own buses have to spend money on fuel and vehicle maintenance.

7. Utility Bills

It is worth noting that the majority of schools in Zambia now have access to electricity. This has been done to ensure security at night, as well as to power certain devices such as computers, printers, and photocopiers. However, this does come with a cost. Every month, schools have to pay for electricity units, so this cost is part of school-based expenses. Ultimately, it is the school's responsibility to secure funding to cover these expenses.

8. Water and Sanitation

Access to adequate water, sanitation, and hygiene is crucial for the well-being and dignity of schoolchildren, as it is essential for good health and education (Ministry of Education, 2020). It is the responsibility of all schools to ensure a reliable supply of safe drinking water, proper toilet facilities, and general cleanliness. However, ensuring good water and sanitation comes at a cost to the school, as it needs to purchase cleaning supplies for toilets, for example. The government and its partners provide water to schools, but it is the school's responsibility to ensure that the water is safe for consumption. In rural and remote areas that rely on boreholes and wells for water, chlorine needs to be added to the water to make it safe for children to drink. Hence, the provision of clean, safe water and sanitation is a school-based cost.

9. Medical Expenses (First Aid)

As stipulated in the Guidelines for the Implementation of the School Health and Nutrition Programme, the education system aims to provide quality education while ensuring learners' health (MOE, 2020). As a top priority, schools allocate funds to procure and stock first-aid medical kits to ensure a quick response to health emergencies involving children. The cost of procuring first aid medical kits falls on schools.

10. Gender-Related Costs

Schools need to cater to the different needs of boys and girls, including managing girls' menstrual hygiene. According to the Ministry of Education (2020), to manage menstruation hygienically and with dignity, girls must have access to clean water, decent toilets, and good hygiene in schools. For this reason, schools stock emergency menstrual hygiene supplies, including disposable and washable pads and cotton wool. The aforementioned items require funds to purchase, and the school covers the cost. However, civil society organisations such as Plan International, USAID under the Keep Girls in School Program (KGS) and FAWEZA supplement the efforts of schools in caring for girl children.

School-Based Costs in Public Secondary and Primary Schools

Table 4-18 displays the expenses of school necessities required to educate a child in Zambia. The current cost of each school item is calculated based on the prescribed percentages in the guidelines for the utilisation of school grants under the Free Education Policy, as shown in the table on secondary school grants. The standard for pupils is one thousand (1000) multiplied by the six hundred kwacha (K600) disbursed in secondary schools per child. Currently, under the free education policy, the government is spending an estimated K600,000 to educate 1,000 pupils. However, this estimated amount is insufficient to provide quality education. To achieve quality education, it is proposed that the cost be estimated at K2,850,000. The unit cost of educating a child in a secondary school in Zambia per year is estimated at K2,850.

Secondary School-Based Cost Per Year for 1000 Pupils (Urban, Rural, Remote)			
School Type	**Cost description**	**Current Cost (1000 Pupils x)**	**Proposed Cost in the face of Quality Education (K)**
Secondary (Boarding & Day)	Teacher education and specialised services	30,000	100,000
	Curriculum and material development	90,000	200,000
	Education standards, assessments and evaluation	45,000	200,000
	Co-curricular activities	75,000	200,000
	Open distance and learning	15,000	50,000
	Infrastructure development	45,000	400,000
	Human resources and administration	180,000	800,000
	Financial management-accounting	30,000	200,000
	Procurement management	15,000	300,000
	Policy, planning and coordination and equity	75,000	400,000
Grand Total		**600,000**	**2,850,000**

Table 4.16: Secondary School-Based Cost per Year for 1000 Learners

Secondary School-Based Cost Per Year a Learner (Urban, Rural, Remote)			
School Type	**Cost description**	**Current Cost (1 Pupil x K600)**	**Proposed Cost in the face of Quality Education (K)**
Secondary (Boarding & Day)	Teacher education and specialised services	30	100
	Curriculum and material development	90	200
	Education standards, assessments and evaluation	45	200
	Co-curricular activities	75	200
	Open distance and learning	15	50
	Infrastructure development	45	400
	Human resources and administration	180	800
	Financial management-accounting	30	200
	Procurement management	15	300
	Policy, planning and coordination and equity	75	400
Grand Total		**600**	**2,850**

Table 4.17: Secondary School-Based Unit Cost per Year for a Learner

Table 4.18 illustrates the key expenses involved in educating a child in a public primary school. Based on research findings, it is estimated that the government spends an amount of one hundred fifty kwacha (150) per child annually. Assuming there are one thousand (1000) pupils in a primary school, multiplied by one hundred fifty kwacha (150), the government is spending an estimated one hundred and fifty thousand kwacha to educate these 1000 pupils. However, this amount is insufficient to provide quality educational services. The estimated cost for providing quality educational services is one million three hundred sixty thousand kwacha (1,360,000). The unit cost of educating a child in a primary school per year in Zambia is estimated at K1360.

Primary School-Based Cost Per Year for 1000 Pupils (Urban, Rural, Remote)			
School Type	**Cost description**	**Current Cost (1000 Pupil x K150)**	**Proposed Cost in the face of Quality Education (K)**
Secondary (Boarding & Day)	Teacher education and specialised services	11,250	50,000
	Curriculum and material development	18,750	60,000
	Education standards, assessments and evaluation	11,250	50,000
	Co-curricular activities	18,750	100,000
	Open distance and learning	3,750	50,000
	Infrastructure development	11,250	200,000
	Human resources and administration	45,000	400,000
	Financial management-accounting	7,500	100,000
	Procurement management	3,750	150,000
	Policy, planning and coordination and equity	18,750	200,000
Grand Total		**150,000**	**1,360,000**

Table 4.18: Primary School-Based Cost per Year for 1000 Learners

Primary School-Based Cost Per Year for 1000 Pupils (Urban, Rural, Remote)			
School Type	**Cost description**	**Current Cost (1 Pupil x K150)**	**Proposed Cost in the face of Quality Education (K)**
Secondary (Boarding & Day)	Teacher education and specialised services	11.25	50
	Curriculum and material development	18,.75	60
	Education standards, assessments and evaluation	11.25	50
	Co-curricular activities	18.75	100
	Open distance and learning	3.75	50
	Infrastructure development	11.25	200
	Human resources and administration	45	400
	Financial management-accounting	7.5	100
	Procurement management	3.75	150
	Policy, planning and coordination and equity	18.75	200
Grand Total		**150**	**1,360**

Table 4.19: Primary School-Based Cost per Year for a Learner

Household-Based Costs

Household-based costs are annual expenses borne by individual households when they send a child to school.

Cost of transport

One of the direct costs of education is thought to be the cost of transportation through buses, cars, motor bikes and bicycles. The cost of pupils' transportation to and from school or for extracurricular activities is ascribed to education and is therefore regarded as a direct cost of education.

As regards the average cost of transportation by spatial consideration, the results presented in Figure 4.11 indicate that transport is more costly in urban areas than in rural and remote areas in Zambia. The average annual transport cost in urban areas is K1949.79, while in rural areas it is K1237.92. The average cost of transport in rural areas is relatively low (K918.9).

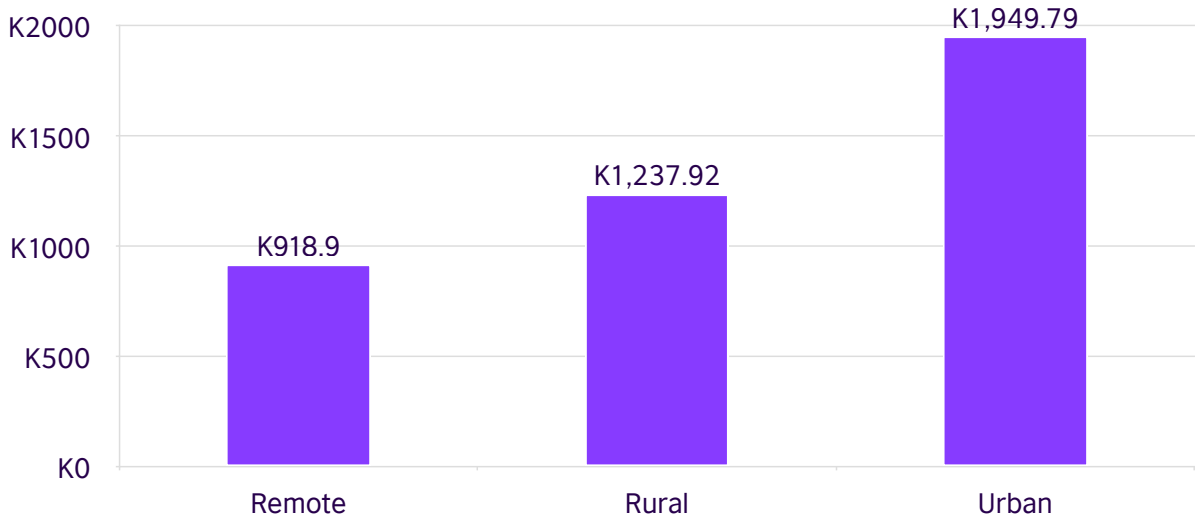


Figure 4.11: Cost of transport by spatial consideration (Per Year)

Additionally, the majority of key informants interviewed concurred with the preceding suppositions on the cost of transport.

> **The cost of transportation for students varies greatly based on a number of variables, including the distance travelled, the form of transportation, the price of fuel, and the local transit system. Due to higher fuel consumption and vehicle wear and tear, longer routes usually lead to higher transportation costs.**

Another parent added that;

> **In certain situations, parents arrange shared transport with neighbouring families to save money. Such arrangements lower the transport expenditure.**

In this instance, the parents were requested to provide the total amount of money they spend on transport for a schoolchild weekly, termly and yearly.

	Weekly	Termly	Yearly
Day school	K100	K1300	K3900
Boarding School	0	K800	K2400

Table 4.20: Cost of transport | Source: Field Data (2024)

Children in boarding schools incur higher transport costs to and from school and on closing days. On average, parents with learners in day schools, especially in urban areas, tend to spend more on transport. In boarding schools, per term, parents spend an average amount of K800, which amounts to K3900 per year. On a weekly basis, parents spend an average of K100. Per term, they spend K1300. Cumulatively, per year, parents with children in day schools spend an average amount of K3900. Some in day schools pay less, or even nothing, because they walk to school. Upon probing, parents of children in day schools said their children mostly walk to school or sometimes ride bicycles. This reduces transport costs, especially for boys who can walk or ride a bicycle to school. In view of the foregoing, a key informant stressed that;

> **In many communities, especially in rural areas or neighbourhoods where transportation options are limited, it is common for pupils to walk to school. Walking to school is often the most affordable option for families, as it does not require paying transportation fees or fuel costs.**

Regarding transport cost and school category, the study establishes a relationship between school category and transport cost. This implies that those in rural and remote schools pay less for transport than those in urban schools. This is also attributed to the means of transport used by learners in urban areas.

In recent years, rising fuel prices have further increased the financial burden on households, as transport costs for buses and cars have increased. As transportation expenses continue to rise, it becomes crucial for families to explore cost-saving alternatives, such as public transport, walking, or cycling when feasible and safe. By finding creative solutions and actively addressing these challenges, families can ease the financial strain associated with school transportation and allocate their resources more effectively.

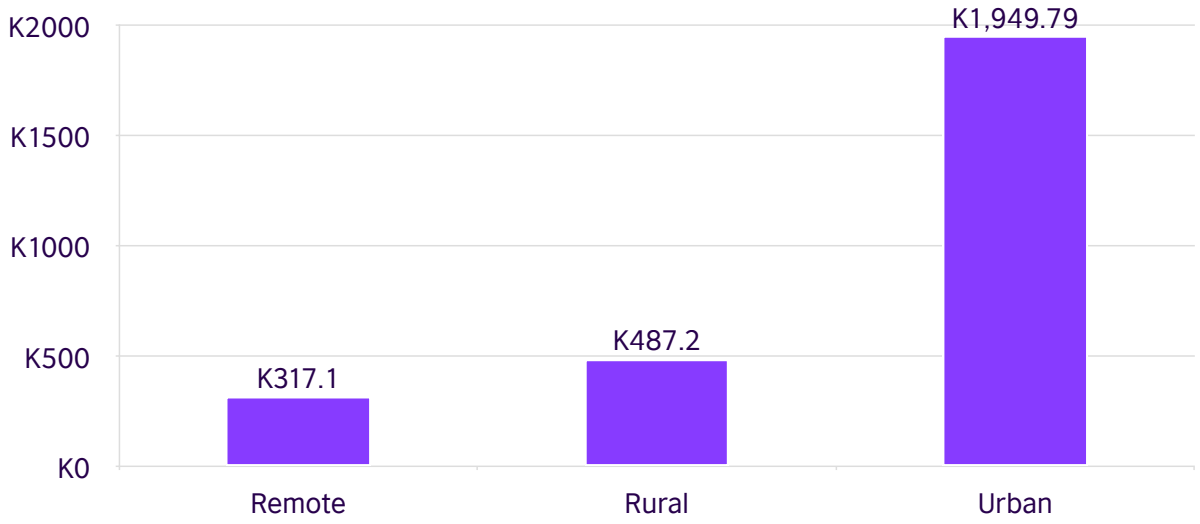


Figure 4.12: Cost of food | Source: Field Data (2024

Figure 4.12 above shows that parents with learners in urban areas tend to spend more on food compared to parents with learners in rural and remote areas. In urban areas, parents spend an average amount of K2602.8 per child. In rural areas, parents spend an average amount of K487.2. In remote areas, parents spend an average amount of K317.1 per child.

Further, regarding the cost of food, a key informant avowed that;

> **Expenditure on school children's food is an essential aspect of family budgeting, and parents strive to balance affordability, nutrition, and convenience to ensure their children are well-fed and healthy.**

> **Parents often incur significant expenses on food for their school-going children. These expenses vary depending on factors such as the child's age, dietary needs and family preferences. Some parents who can afford it choose to pack lunches for their children to take to school**

The cost of food for pupils varies significantly depending on various factors such as location, dietary preferences, school meal programs, and economic conditions. In Zambia, as in many other countries, the cost of food for pupils depends on whether they bring their own packed lunch or purchase school-provided meals. If pupils bring their own packed lunch from home, the cost can vary based on the types of food items included and the family's budget. Packed lunches may range from relatively inexpensive options to more elaborate and costly meals, depending on individual preferences and dietary requirements.

Some schools in remote and rural areas offer subsidised or free meal programs for pupils, particularly in areas with high levels of poverty. These programs aim to ensure that pupils receive at least one nutritious meal during the school day, which can help improve attendance, concentration, and overall health. The cost of these meals varies depending on government subsidies, donations, and resource availability.

In schools with on-site tuck shops, pupils can purchase meals prepared by the school. The cost of cafeteria meals varies depending on the food offered. Prices for food sold in schools are relatively affordable for some families but could pose a financial burden for others, particularly those with multiple children attending school. Regardless of the cost, Elsas (2011) adds that it is important for school meals to provide adequate nutrition to support pupils' growth, development, and academic performance. Meals should include a balanced mix of proteins, carbohydrates, fruits, vegetables, and other essential nutrients to meet pupils' dietary needs.

Overall, the cost of food for pupils can vary widely depending on individual circumstances and resource availability. Schools, governments, and communities may implement various strategies to ensure that pupils have access to nutritious meals during the school day, regardless of their economic background. The cost of food is an important financial consideration for parents, whether they are paying for school meals or preparing packed lunches for their children. Some families struggle to afford school meals or packed lunches, adding pressure on their budgets. The cost of school meals, including packed lunches, affects many families. While packed lunches offer flexibility and personal choice, the annual cost can add up for families.

To support those in need, some stakeholders have implemented free school meal programs in rural and remote schools (ZOCS, 2023). This initiative aims to alleviate financial burdens by providing eligible students with nutritious meals at no cost. The program not only supports families but also ensures that children have access to healthy meals during the school day, promoting and supporting their overall well-being and school experience. Such initiatives reduce the cost of food for families when sending children to school.

The amount of pocket money parents or guardians spend on food for school-age children varies not by students' exact ages but by age group, according to Bonke (2013). The study found that

children between the ages of 7 and 11 spend an average of 20 EUR (K450) per month, while those between the ages of 12 and 17 spend an average of 30 EUR (K650) per month. The amount given to girls aged 12-17 is slightly higher than that given to boys, but the amounts for boys and girls aged 7-11 who receive pocket money are roughly equal. The findings demonstrated that the average amount of pocket money received is only about 20% of all such spending. Parents purchase most food items, or at least pay for them directly, so children buy only a small amount with their pocket money. It goes without saying that students in the two age groups receive different amounts of pocket money each month.

Cost of school uniforms

A school uniform is one of the compulsory items in school. In this case, every student is supposed to have a school uniform, an expense borne by the parents and guardians (families or households). It was of interest for this study, therefore, to establish the amount of money that parents spend on uniforms for their children in school spatially.

consideration, gender and category of the school. The parents were asked to indicate how much money they spend on school uniforms for their children.

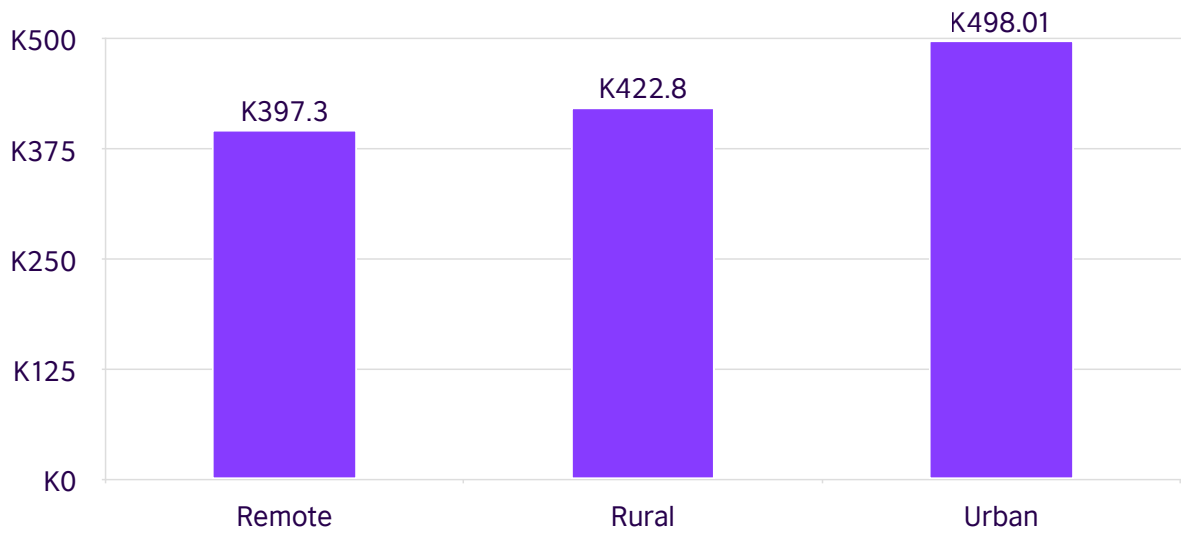


Figure 4.13: Average cost of school uniform by spatial consideration

On the actual uniform cost by spatial consideration, the results as presented in the figure (Figure 4.13) above indicate that the cost of uniformity in urban areas is more costly compared to rural and remote areas in Zambia. The average cost of a school uniform in urban areas is K 498.01. Conversely, the cost of a school uniform in rural areas is K422.8 and K397.3 in remote areas. This shows that parents with children in schools in urban areas spend more on school uniforms for their children, hence upscaling their unit cost.

In line with the school category, the study established that learners in boarding schools spend more money on uniforms than those in day schools. In day schools, the average expenditure on school uniforms is cheaper compared to those in boarding schools. This implies that children in boarding schools pay more for school uniforms compared to children in day schools. The study further established that parents with children in grant-aided schools spend more when buying uniforms for their children as compared to parents with children in private, public and community schools. The table (Table 4.21) below shows that the average cost of a uniform for a learner at a grant-aided school is K559.46. This was preceded by private schools with an average cost of K527.08. The average cost of a uniform for a child at a public school is K418.12. The lowest priced uniforms (K306.14) are for learners in community schools.

Uniform	Mean	N	Std. Dev
Public	418.44	823	348.123
Private	527.08	65	431.657
Grant Aided	559.46	84	467.22
Community	306.14	22	180.989
Total	**434.97**	**994**	**365.69**

Table 4.21: Average cost of a uniform by school type | Source: Field Data (2024)

The above findings align with the qualitative findings emerging from interviews with key informants and parents. One of the key informants interviewed echoed that.

> **The cost of school uniforms in urban areas is considerably higher compared to rural and remote areas. Parents with school-going children in urban areas tend to spend more money on school uniforms. The last time I got a uniform for my daughter, who is in grade 11, I spent more than K450.**

> **We, as parents and guardians, are not helped by the fact that certain schools, particularly grant-aided schools and boarding schools, have far more costly uniforms. Individuals are supposed to sell the uniforms at or near the cost of making them, raise the money to continue making them, and repeat the process. The idea is to create a standard uniform made with quality materials to last longer, curb counterfeiting, and pay the tailor for the cost. However, some individuals overprice the uniforms to make more money.**

Some individuals are selling uniforms at an exorbitant price. Sadly, some parents in our community cannot afford to buy school uniforms for their children. As a result, some pupils are forced to continue wearing old school uniforms or go to school without one.

Regarding the price of uniforms in community schools, one of the key informants echoed that

In community schools in Zambia, the cost of uniforms varies based on several factors, including the quality of materials, each school's specific requirements, and families' economic circumstances. Community schools often aim to provide education to children from low-income households and, as such, may strive to keep uniform costs affordable. However, the exact cost of uniforms in community schools can fluctuate and may not be uniform across all schools.

Average School Uniform Cost by Gender

The analysis of school uniform costs by gender was equally important to this study. As shown in the table below (Table 4.22), girls' uniforms are more costly than the boys' uniforms. The results show that, on average, girls spend K445.3 and boys spend K420.75 on a uniform every year. This shows that parents with girls in school spend more on school uniforms for their children, hence upscaling their unit cost.

Uniform	Mean	N	Std. Dev
Male	420.75	418	341.885
Female	445.3	576	382
Average Costs	**434.97**	**994**	**365.69**

Table 4.22: Average School Uniform Cost by Gender | Source: Field Data (2023)

In Zambia, the cost of school uniforms for both boys and girls varies based on several factors, such as the type of school, the materials used, and whether the uniforms are new or used. For both boys and girls, the standard school uniform consists of shirts, trousers or skirts, sweaters, ties and socks. Shirts for both boys and girls range from around K50 to K150, depending on quality and brand. Trousers for boys and skirts for girls range from K50 to K150, depending on quality and style. Sweaters vary from around K100 to K200 or more, depending on the quality and brand. Ties for boys and girls cost around K20 to K50, depending on the design and quality. Lastly, sock prices range from K10 to K30 per pair. In line with the foregoing, one of the parents added that;

> **Every year, I have to buy a full school uniform for my child, who is currently in grade 9. A full school uniform comprises shirts, trousers or skirts, sweaters, ties and socks. Early this year, I spent over K500 to get all these.**

The cost of uniforms for Early Childhood Education learners in Zambia varies based on several factors, including the type of institution (public or private), the specific requirements of each school or program, and the quality of materials used. Generally, ECE uniforms are simpler and less expensive than those for older students.

There are cost differentials in school uniforms across students' ages, genders, class levels, and the school's category. The results also suggest that school uniform costs vary by class level, with parents of children in secondary schools paying more than those with children in lower classes (ECE and Primary). On average, a parent with a child in ECE spends K293.82 on uniforms compared to parents with learners in primary who spend K401.5. Parents with learners in secondary schools, on average, spend 484.13. This information is tabularised in Table 4.23 below.

Uniform	Mean	N	Std. Dev
ECE	293.82	38	249.896
Primary	401.5	372	370.42
Secondary	484.13	457	365.857
Average Costs	**434.97**	**994**	**365.69**

Table 4.23: Cost of uniform by level of school | Source: Field Data (2024)

Schools do not provide free uniforms; they only provide a general standard of what type, shade and colour of uniforms are required, and ensure that school children conform to the standard of uniforms as guided by the school, whilst allowing parents and guardians to purchase uniforms from other sources that produce similar uniforms and most likely at competitive prices (Ministry of Education, 2021).

Overall, school uniforms play an important role in the Zambian education system, contributing to a sense of identity, discipline, and equality among students. However, efforts to address issues related to the cost and accessibility of uniforms are ongoing to ensure that all students have equal opportunities to participate in education.

For many families, especially those with limited financial means, purchasing uniforms for multiple children can be a significant expense. Some surveyed parents indicated that the cost of school uniforms and supplies put a strain on their household budgets. One of the highest costs for parents is school uniforms, which can be a significant burden on tight budgets. Schools often have strict uniform policies, requiring specific items that need to be purchased from designated suppliers. Some shops charge significantly more for pupils' uniforms than supermarkets that make basic school uniforms.

The qualitative data collected from CSOs and policymakers revealed that the cost of school uniforms is a significant burden for some parents, especially in rural and remote areas. In light of this, one of the policy makers intimated that;

> **It is a common challenge in many countries, including Zambia, that some parents may struggle to afford school uniforms for their children. This inability to purchase uniforms can stem from various factors such as low income, unemployment, or financial hardships.**

Raising awareness of the affordability issue of school uniforms can help mobilise support from various stakeholders, including government officials, community leaders, and the general public. Advocacy efforts may lead to policy changes or increased resources allocated to support families in need. Moreover, individuals, businesses, or organisations with the means may donate funds or sponsor uniforms for students in need. This could be done through partnerships with schools or through established charitable organisations.

Addressing the affordability of school uniforms requires a multifaceted approach that involves collaboration among government agencies, schools, communities, and non-profit organisations. By working together and implementing targeted interventions, it is possible to ensure that all children have access to the uniforms they need to participate in education.

Cost of books

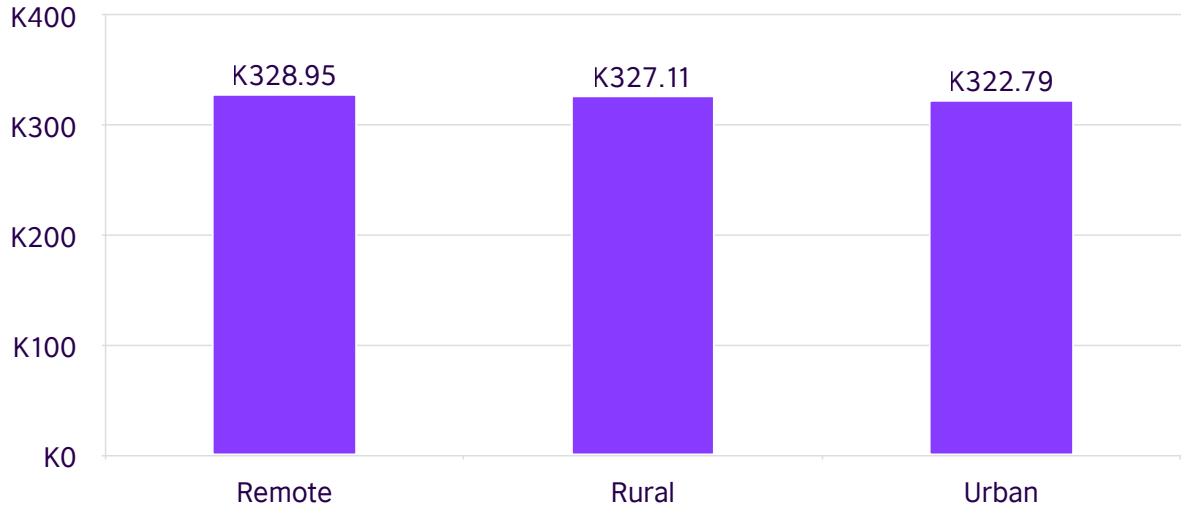


Figure 4.14: Cost of books | Source: Field Data (2024)

As regards the average cost of books by spatial consideration, the data presented in Figure 4.14 shows trifling marginal differences. The cost of books is K328.95 in remote areas, K327.11 in urban areas and K322.79 in rural areas. This clearly indicates that the cost of books is slightly higher in remote areas than in urban and rural areas.

The cost of exercise books in Zambia varies depending on factors such as the size, quality, brand, and where you purchase them. Generally, exercise books can range from around ZMW 5 to ZMW 30 or more per book. Lower-priced exercise books may have fewer pages, lower-quality paper, and simpler covers, while higher-priced books may have more pages, higher-quality paper, and possibly branded covers. Additionally, prices may also vary depending on whether you purchase the exercise books from a local market, a specialised stationery store, or a larger retailer.

The cost of books also makes up the unit cost of education in schools. In Zambia, parents buy books at the beginning of the term for learners in community, primary and secondary schools. In secondary schools, parents buy additional books in terms two and three to supplement the books bought in term one.

As far as the cost of books in Zambia is concerned, gender is irrelevant. The research findings indicate that book prices remain essentially constant for students of all ages. This is explained by how books are sold, which is essentially uniform. Parents now spend the

The same amount of money on books for both sexes. Additionally, compared with parents of primary school students, parents of secondary school-aged children spend more on schoolbooks. One possible explanation for this could be the variety of subjects that students study.

Cost of a school bag

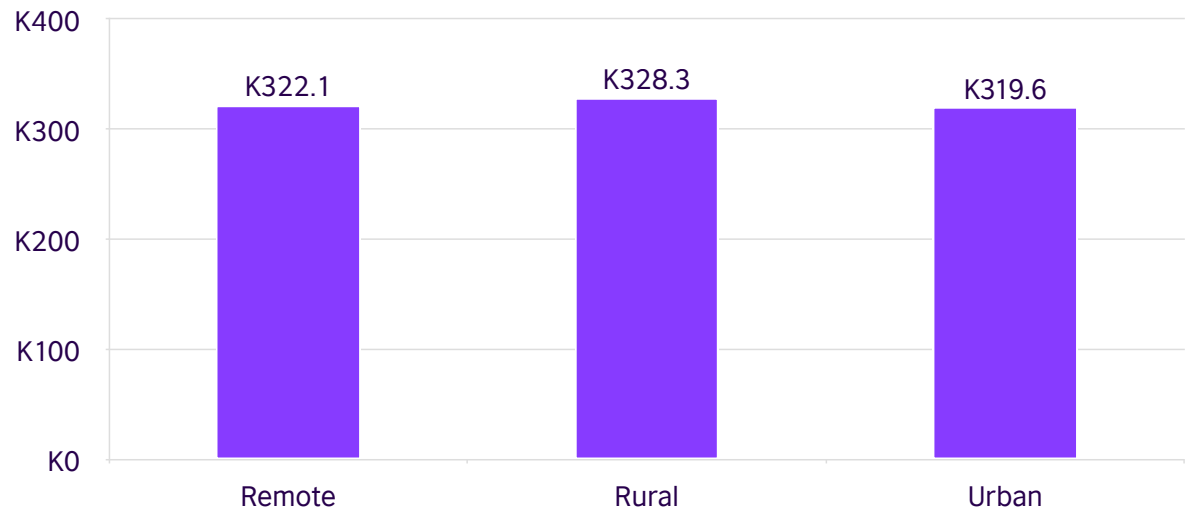


Figure 4.15: Cost of a school bag by spatial consideration | Source: Field Data (2024)

The cost of a school bag in remote areas is slightly higher compared to rural and urban areas. The cost of a school bag in rural areas is K332.1. In rural areas, the average cost of a school bag is K328.3. Urban areas had the lowest price of a school bag (K319.6).

The cost of school bags in Zambia can vary depending on factors such as size, quality, brand, and where you purchase them from. Generally, school bags can range from around ZMW 50 to ZMW 300 or more. Lower-priced school bags may be basic in design and made from less durable materials, while higher-priced bags may be of better quality, more durable, and possibly branded.

Additionally, prices may also vary depending on whether you purchase the bag from a local market, a specialised school supplies store, or a branded outlet.

A school bag is one of the most essential items for school children. It is used as a means of transporting items such as exercise books, a pencil box, a water bottle, and a lunchbox to and from school. Apart from this, a school bag helps a child keep their belongings safe from external damage, such as the sun, dust, or rain. It comes in various shapes and sizes, such as a school backpack or book bag.

Cost of shoes

The task of buying school shoes falls on parents and guardians termly or annually. School shoes are frequently ranked among the most important items a learner needs. Choosing the appropriate shoes for the school year is quite important, even though it could seem like a simple task. The study, therefore, sought to ascertain or determine the cost of school shoes. The cost of school shoes by spatial consideration is illustrated using the figure below;

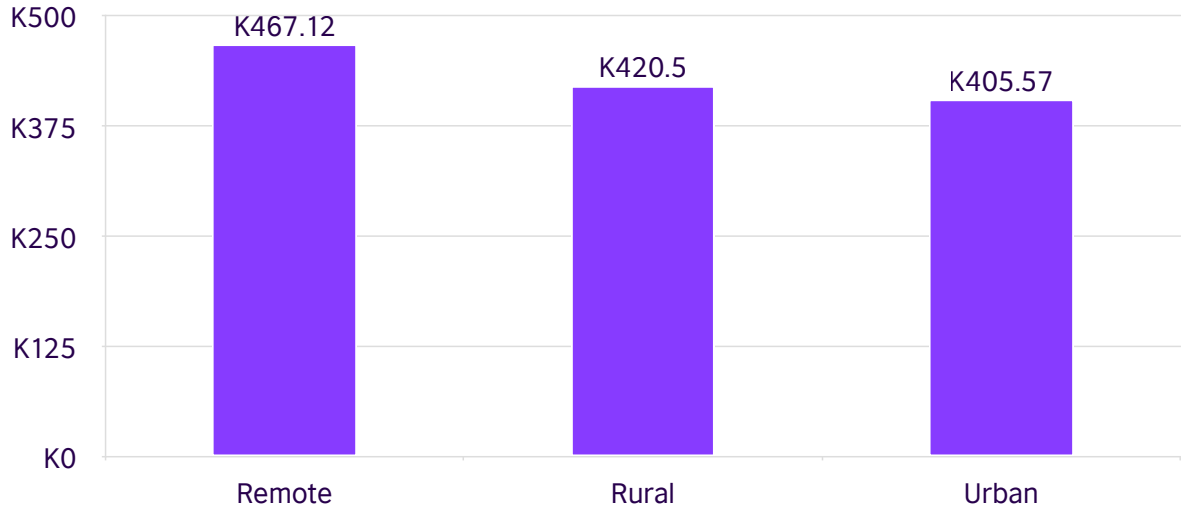


Figure 4.16: Cost of shoes | Source: Field Data (2024)

Figure 4.16 shows that the cost of shoes in remote areas is relatively higher compared to rural and urban areas. The cost of shoes in remote areas is K467.12. Rural areas precede this with a cost of K420.5. Lastly, the cost of shoes in urban areas is K405.57.

The cost of school shoes in Zambia varies depending on factors such as the quality, brand, and where you purchase them. Generally, school shoes range from around ZMW 100 to ZMW 500 or more per pair. Lower-priced school shoes may be basic in design and made from less durable materials, while higher-priced shoes may be of better quality, more durable, and possibly branded. Additionally, prices may also vary depending on whether you purchase the shoes from a local market, a specialised shoe store, or a branded outlet.

Other costs

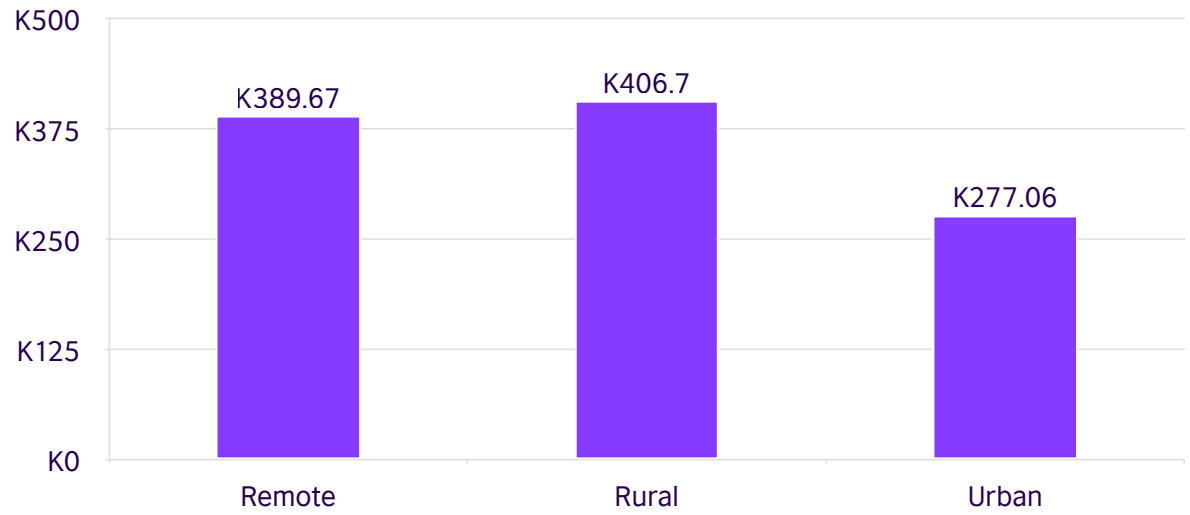


Figure 4.17: Cost of other expenses | Source: Field Data (2024)

Beyond direct school-related expenses, parents incur various other education costs to support their children's learning and development. These additional costs encompass a wide range of items and services. Figure 4.17 shows that parents and guardians in rural areas spend an average amount of K406.7 on other expenses. In remote areas, parents and guardians spend an average amount of K389.67. In urban areas, parents and guardians spend an average of K277.06 per learner. These expenses are related to educational field trips organised by schools or undertaken to museums, historical sites, or other educational destinations.

Students' participation in school trips and excursions is an integral part of their education, but these outings frequently incur additional costs that parents must budget for. These encounters expose learners to diverse settings, cultures, and experiences while offering them opportunities for experiential learning outside the classroom. School trips help students develop a broader perspective and a deeper awareness of the world around them, adding value to their educational experience. Even though they can be expensive, school trips offer unique opportunities that advance a child's learning and development. To facilitate parent participation in these events, schools can offer payment plans that allow parents to split the cost by paying a set amount each month.

Families and parents may have additional costs for extracurricular activities such as sports teams and after-school organisations. This may include sports equipment, club dues, and other supplies. However, many parents and educators would argue that it is worth it because children's social skills, physical health, and personal growth improve when they participate in these after-school programmes.

Additionally, sanitary hygiene is critically important for girls in schools to ensure their health, well-being, and ability to participate in education fully. Access to clean, safe menstrual hygiene products, adequate sanitation facilities, and education on menstrual health are crucial. Without these, girls may miss school days, fall behind academically, or even drop out altogether. Additionally, poor menstrual hygiene can lead to infections and other health issues. Ensuring proper sanitary hygiene for girls in schools is not just a matter of health, but also of dignity and equality, allowing them to thrive in their educational pursuits.

Additional Findings on School fees: Private and Grant-aided schools only

In Zambia, private schools often target families who are willing and able to pay for the perceived benefits of a private education. However, this can lead to socioeconomic disparities in access to quality education, as families with lower incomes may struggle to afford private school fees.

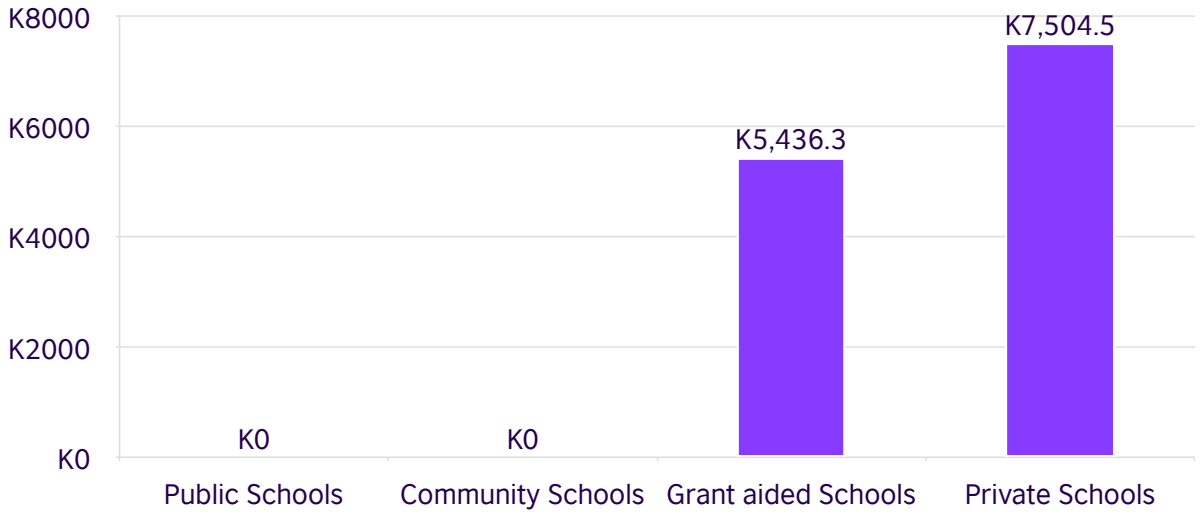


Figure 4.18: Cost of school fees by school type | Source: Field Data (2024)

Figure 4.18 shows that the average cost of school fees in Private schools is K7504.5, while in grant-aided schools it is K5436.3. The cost of fees at private schools is higher than at grant-aided schools. It is common for private schools to have higher fees than public or government-run schools. This is often because private schools typically offer additional facilities, smaller class sizes,

specialised programs, and sometimes a different curriculum compared to public schools. These added features contribute to the higher cost of education in private institutions.

Private school fees vary widely depending on the school's location. In general, private schools in urban areas tend to have higher fees than those in rural areas. This is because urban areas typically have a higher cost of living, which drives up the cost of operating a school. Additionally, private schools in urban areas may have more resources and better facilities than those in rural areas, which also contributes to higher fees. However, it is important to note that private school fees vary widely within each area and depend on many factors, such as the school's reputation, facilities, curriculum, and other considerations.

In a rural area, private school fees may include tuition, meals, housing, and even transportation to and from school (if necessary). In an urban area, private school fees may include tuition, housing, and meals. Private schools in rural areas are generally less expensive because they can charge lower tuition to cover transportation costs. In urban areas, private school fees are higher because wealthier families are moving there and because of the higher cost of living.

Private schools have witnessed a steady increase in fees over the past five years. These escalating costs pose financial challenges for families wanting a premium education for their children. While the exact figures may vary among private schools, it is important to consider additional expenses such as uniforms, extracurricular activities, and transportation, which further impact the overall cost. As a result, families who want to pay for private education must carefully assess their ability to pay and explore available financial aid or scholarship options (which are usually based on exam results) to make informed decisions regarding their child's education.

The government partially funds grant-aided schools in Zambia, but they may still charge fees to supplement their resources and cover operational costs. The fees in grant-aided schools tend to be lower than those in private schools, but may still vary depending on factors such as the school's location, facilities, and level of education provided.

Chapter 5:

Analysis Of Findings

Mean School And Household Cost (Kwacha)

The findings of this study show that the cost of educating a child exceeds what the government currently provides. The current annual school grant is K160 per student at the primary level and K600 per student at the secondary level. In contrast, this study proposes an expenditure of K1360 for primary and K2850 per secondary student as the required amount to deliver quality education within the Zambian context.

It is worth noting that while the government provides a school grant, it covers only a fraction of the total expenses associated with educating a child. The mean cost of education for both boys and girls includes various components, such as food, transportation, uniforms, shoes, and other miscellaneous expenses. School fees represent just one aspect of the overall unit cost of education. Since households are responsible for covering the majority of these expenses, it is evident that they endure most of the financial burden in ensuring their children receive an education. For instance, the school grant covers only school-based costs, such as basic academic materials, but it often falls short of addressing all educational needs. Meanwhile, families shoulder high costs for daily meals, transportation to and from school, and uniforms, shoes, and other essential items. Moreover, the differential costs between boys and girls, especially regarding gender-specific expenses such as sanitary products for girls, further emphasise the household's financial responsibility in providing for their children's education.

The overview of the current grant against the proposed expenditure is shown below.

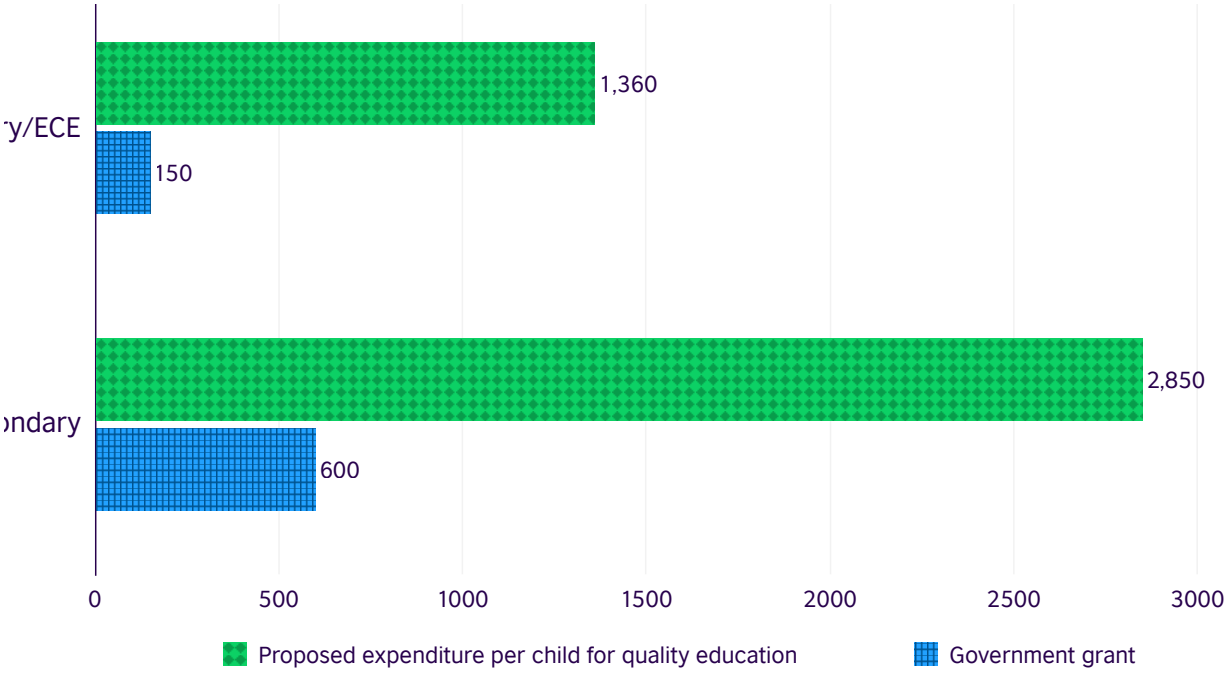


Figure 5.1: Grants vs proposed expenditure per child at Primary and secondary schools (ZMK)

The findings of this study show that the mean cost of educating a child in Zambia, encompassing expenses such as school grant per child (ZMK 600), transportation (ZMK 3,545), food (ZMK 7,746), books (ZMK 240), a school bag (ZMK 274), shoes (ZMK 426), other school expenses, including sanitary costs for girls (ZMK 398), and a school uniform (ZMK 435), amounts to approximately ZMK 13,746 per year. These figures shed light on the financial commitments required to ensure a child's access to education in Zambia, underscoring the importance of financial planning and support to ensure equitable educational opportunities for all children.

The current mean adjusted unit costs per child for Primary/ECE schools are as follows:

	School grant	Transport per year	Food per year	Books	Bag	Shoes	School expenses	Uniform	Total (K)
Mean	150	3545	7746	160	274	326	398	402	**12, 518**

Average mean costs for Primary/ECE schools before the introduction of the free Education Policy of 2021

	School grant	Transport per year	Food per year	Books	Bag	Shoes	School expenses	Uniform	Total (K)
Mean	90	2600	6300	120	180	220	260	280	**10,050**

Average mean costs for Primary/ECE schools for Quality of Education Provision are:

	School grant	Transport per year	Food per year	Books	Bag	Shoes	School expenses	Uniform	Total (K)
Mean	1360	3545	7746	160	274	326	398	402	**13, 728**

The current mean adjusted unit costs per child for Secondary school are as follows:

	School grant	Transport per year	Food per year	Books	Bag	Shoes	School expenses & Boarding essentials	Uniform	Total (K)
Mean for Day	600	3545	7746	322	274	426	398	435	**13746**
Mean for Boarding	600	1800	3000 Boarding Fees	322	374	426	4898	435	**11,755**

Average mean costs for secondary schools before the introduction of free Education:

	School fees + PTA	Transport per year	Food per year	Books	Bag	Shoes	School expenses	Uniform	Total (K)
Mean for Day	900	3000	6200	250	200	320	260	310	**11440**
Mean for Boarding	900	1200	5400 Boarding Fees	250	200	320	260	310	**8840**

Average mean costs for secondary schools for Quality of Education Provision are:

	School grant	Transport per year	Food per year	Books	Bag	Shoes	School expenses & Boarding essentials	Uniform	Total (K)
Mean for Day	2850	3545	7746	322	274	426	398	435	**15996**
Mean for Boarding	2850	1800	3000 Boarding Fees	322	374	426	4898	435	**14005**

The implications of this gap are profound. Schools are forced to operate with limited resources, which can negatively affect the quality of education provided. It may lead to shortages of instructional materials, outdated infrastructure, and inadequate facilities, hindering students' learning experiences and overall academic performance. Moreover, the burden falls heavily on parents and guardians to cover the remaining costs, potentially exacerbating financial hardships and limiting access to education for disadvantaged families. To address this issue and ensure equitable access to quality education for all children, there is an urgent need for the government to re-evaluate and increase the grants allocated to schools.

Adjusted mean costs by gender

Using the Zambia Public Procurement Authority (ZPPA) quarterly average Market Price Index (MPI), the mean cost of educating a child in Zambia, including boarding fees, encompasses various expenses such as uniforms for girls (ZMK 556) and boys (ZMK 888), as well as leather shoes for women (ZMK 338) and men (ZMK 476). Additionally, it includes costs for food (ZMK 8746), transportation (ZMK 5,850), and other school expenses (ZMK 398.16). Boarding fees (ZMK 3,000) constitute a significant portion of the total expenses. This comprehensive breakdown highlights the substantial financial commitment required from households to ensure a child's education. Despite the government's provision of a school grant (ZMK 600), families bear the majority of the financial burden. Therefore, to alleviate this burden and promote equitable access to education, there is a critical need for enhanced government support and investment in education across Zambia. Note that using a uniform with the MPI is very expensive. This is because the MPI indicates competitive prices, but it also entails that ensuring quality is expensive. For example, uniforms are cheaper because people buy from tailors; the cost of shoes and belts, as reported by respondents, is lower than the MPI reported by ZPPA because not all parents buy leather shoes and belts.

School and Home-based costs	Mean (K)
Average for uniform	722
Average leather shoe	407
Food per year	
Transport per year	5850
School grant	600
Other School expenses (sanitary towels)	398
Boarding	3000
Books (8 per year)	240
Total	**18963**

Table 5.1: Mean cost of educating a child by gender using the MPI

While the government's provision of the school grant is essential, it is insufficient to alleviate the financial strain on households. To ensure equitable access to education and To relieve families of excessive financial burdens, there is a pressing need for increased government support, including expanded grants or subsidies to cover a broader range of educational expenses beyond just school fees. This would help alleviate the financial strain on households and ensure that all children, regardless of socioeconomic background, have equal opportunities to access quality education in Zambia.

Summary Of All Costs Related To Unit Costs

Therefore, the proposed comprehensive costing for educating a child in Zambia will incorporate household direct and indirect educational costs and expenses and the government grant as follows:

Secondary School Average cost	K
a) Household Direct Educational Costs	
Uniform	435
Shoes	426
Books	322
Bag	274
Total Educational Costs	**1,457**

b) Household Indirect Educational Costs (Day School)	
Food	7,749 per year
Transportation	3,545 per year
Other School Expenses	398 per year (Sanitary towels, girls' needs, etc.)
Total Indirect Costs (Day school)	**11, 692**

Boarding Costs	
Boarding Fees	3,000 per year (1,000 per term)
Boarding school Transport	1,800 (600 per term)
Boarding essentials/food/toiletries	4,500 (1,500 per term)
Other School Expense	398 per year (Sanitary towels, girls' needs, etc.)
Total Indirect Costs (Boarding school)	**9, 698**

Secondary School Average cost	K
c) School-Based Costs	
School Grants	600, 000 (600 per year per child x 1000 pupils per year)
Cost of Education per Child (Day School)	(Direct + Indirect Educational Costs) + Government Grants = 1457 + 11692 + 600 = **K13, 749 (USD 573)**

The school-based cost (proposed revised school grant), as determined by the consultant, to ensure quality of education per child, is K2,850.

Therefore, the real unit cost per child in Zambia is:

Day school

1,457 + 11,692 + 2,850 =K15,999 (USD 667)

Cost of Education per Child:

Boarding

1,457 + 9,698 + 600 = K11, 755 (USD 490)

The school-based costs, as determined by the consultant, to ensure quality of education per child are K2,850.

Boarding school

the real unit cost per child in Zambia is:

1,457 + 9,698 + 2,850 = K14, 005 (USD 484)

Summary Of All Costs Related To Unit Costs

Therefore, the proposed comprehensive costing for educating a child in Zambia will incorporate household direct and indirect educational costs and expenses and the government grant as follows:

Primary School Average cost	K
a) Household Direct Educational Costs	
Uniform	402
Shoes	326
Books	160
Bag	274
Total Educational Costs	**1,162**

b) Household Indirect Educational Costs	
Food	7,749 per year
Transportation	3,545 per year
Other School Expenses	398 per year (Sanitary towels, girls' needs, etc.)
Total Indirect Costs (Day school)	**11, 206**

Secondary School Average cost	K
c) School-Based Costs	
Teacher salaries	K15.2 billion (emoluments)
School Grants	K150, 000 (K150 per year per child x 1000 pupils per year)
Cost of Education per Child (Day School)	(Direct + Indirect Educational Costs) + Government Grants = 1162 + 11206 + 150 = K12, 618 (USD 526)

The school-based costs (proposed revised school grant) as determined by the consultant, which can ensure quality of education at Primary/ECE per child, is K1, 360.

Therefore, the real unit cost per child in Zambia is:

Day school

1457 + 11692 + 1360 =K13828 (USD 576)

In this calculation, the cost of educating a child is not fixed and can vary significantly depending on the government's coverage of expenses. When the government takes up certain costs, such as providing food through school feeding programs or offering free uniforms and books, the financial burden on households is alleviated. This reduction in household expenses directly affects the total cost of educating a child. For example, if the government covers the cost of food through school feeding programs, families no longer need to allocate funds for meals, resulting in significant savings for households. Similarly, providing free uniforms and books reduces the direct educational costs borne by parents or guardians. As a result, the total cost of education per child decreases when the government takes up these expenses. This not only eases the financial burden on families but also ensures that children from low-income households have equal access to education, removing financial barriers and contributing to the realisation of free education.

By applying these costs, stakeholders can have a clearer understanding of the financial resources required to educate a child in Zambia. This framework enables better planning and resource allocation, ensuring that every child has access to quality education without financial barriers. Regular review and adjustment of this framework can help it adapt to changing needs and circumstances, ultimately supporting the goal of providing equitable education for all children in Zambia.

Overall, recognising the variable nature of education costs and the impact of government interventions on household expenses underscores the importance of regularly assessing and adjusting grant allocations to ensure that they adequately reflect the evolving needs of students and families, ultimately contributing to improved access to quality education for all children.

School based costs

Cost Description	Primary	Proposed Cost for Quality Education	Secondary	Proposed Cost for Quality Education
Teacher education and specialised services	K11.25 ($0.46)	K50 ($2)	K30 ($1.25)	K100 ($4)
Curriculum and Material Development	K18.75 ($0.78)	K60 ($2.5)	K90 ($3.75)	K200 ($8)
Education standards, assessments and evaluation	K11.25 ($0.46)	K50 ($2)	K45 ($1.87)	K200 ($8)
Utility Bills and School Health	K18.75 ($0.78)	K100 ($4)	K90 ($3.75)	K200 ($8)
Infrastructure development	K3.75 ($0.15)	K50 (S2)	K45 ($1.87)	K50 ($8333)
Human resources and administration	K11.25 ($0.46)	K200 ($8)	K75 ($3.12)	K400 ($16.6)
Financial Management-Accounting		K400 ($16)		
Procurement management	K7.5 ($0.1)	K100 ($4)	K15 ($0.62)	K200 ($8.3)
Policy, planning, and coordination, equity, and extracurricular activities	K3.75 ($0.15)	K150 ($6.25)	K75 ($3)	K300 ($12.5)
Grand Total	**K150 ($6.25)**	**K1360 ($56.66)**	**K600 ($25)**	**K2850 ($118.75)**

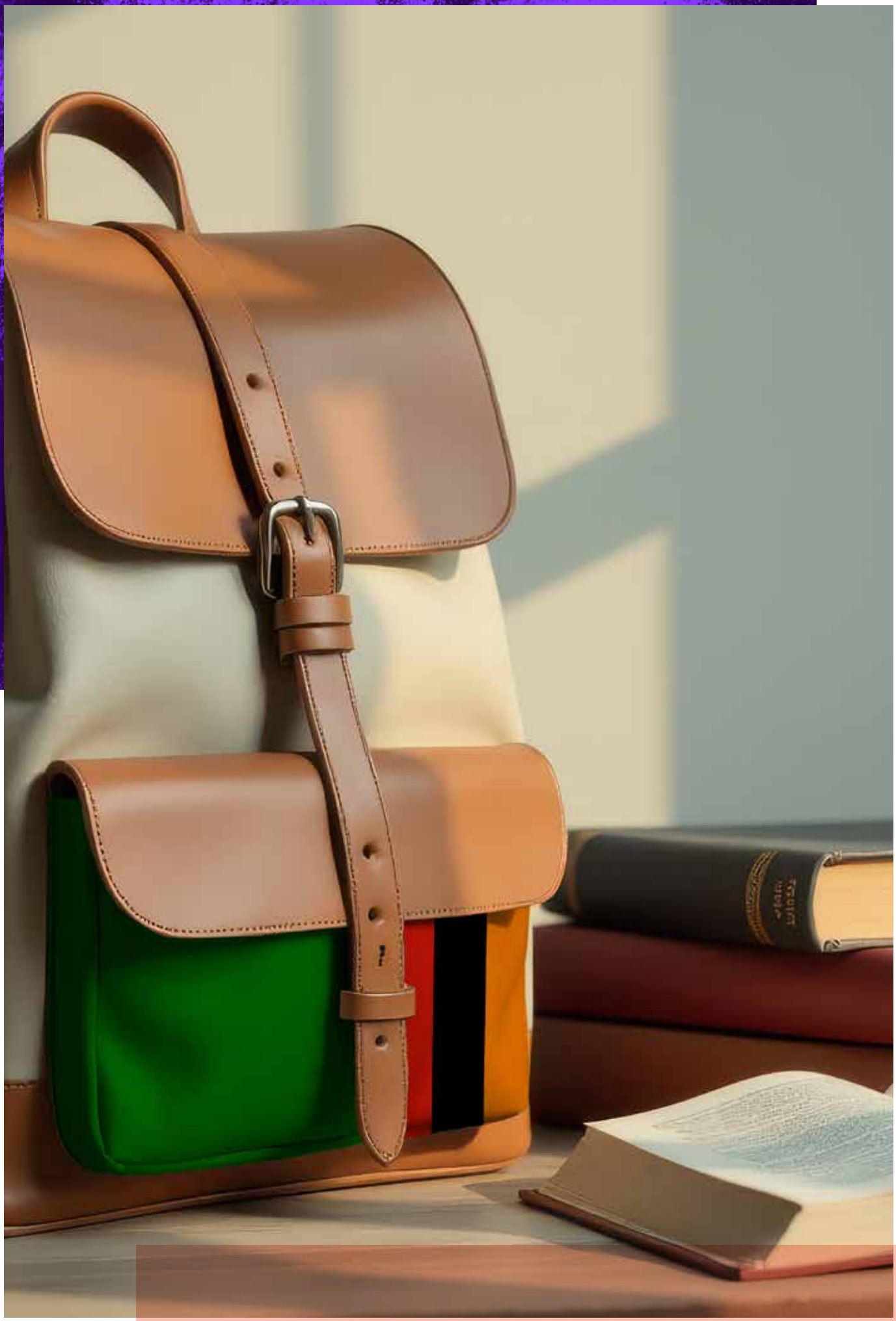
Household based costs (per learner)

Cost Description	Remote	Rural	Urban	Primary	Day Secondary School	Boarding School
Books	K328.95 ($13.7)	K327.11 ($13.6)	K322.79 ($13.4)	K160 ($6.67)	K322 ($13.42)	K322 ($13.42)
Uniform	K397.3 ($16.5)	K422.8 ($17.6)	K498.01 ($20.7)	K293.82 ($12.2)	K418.44 ($17.4)	K559.46 ($23.3)
Shoes	K467.12 ($19.5)	K420.5 ($17.5)	K405.57 ($16.8)	K326 ($10.4)	K426 ($17.75)	K426 ($17.75)
School Bag	K332.1 ($13.8)	K328.3 ($13.6)	K319.6 ($13.3)	K274 ($11.41)	K274 ($11.41)	K274 ($11.41)
Food	K951 ($39.23)	K1,461.6 ($60.9)	K7808.4 ($325.35)	K7749 ($322.88)	K7749 ($322.88)	K3000 ($125)
Transport	0	0	K3,900 ($162.5)	K3545 ($147.7)	K3545 ($147.7)	K1800 ($75)
Boarding Fees	0	0	0	0	0	
Other Costs	K389.67 ($16.2)	K406.67 (%16.9)	K277.06 ($11.5)	K257 ($10.70)	K357 ($14.90)	K1500 ($62.5)
Grand Total	**K2865.24 ($119.39)**	**K3366.98 ($140.29)**	**K13,531.43 ($563.81)**	**K12625 ($515.33)**	**K13506 ($562.75)**	**K11449.46 ($477.06)**
Exchange Rate I USD=ZMK24						

	Unit Costs Differentiation	Costs
1	Current Mean Primary/ECE Education	K12, 518
2	Adjusted Mean for Primary/ECE for Quality	K13,825
3	Current Mean Secondary Day	K13746
4	Current Mean Secondary Boarding	K11,755
5	Adjusted Mean for Secondary Day for Quality	K15996
6	Adjusted Mean for Secondary Boarding for Quality	K14005
7	**Current Average Unit Cost For Ece/ Primary Secondary**	**K12,606 (USD 525)**

Calculated at: 1USD=24ZMK
Average Unit Cost In Zambia= F(X) =USD (525) + Fn (F is Inflation and n is year)

Table 5.2: Framework Considerations



Chapter 6:

Conclusion And Recommendations

The findings presented in this report clearly show that the Zambian public education financing system utilises a cost-sharing model. Educating a child involves two types of costs: school-based costs that the school (government) incurs, and household-based costs, which include direct expenses borne by the learner's parents or guardians.

The findings indicate a consensus (89% agreement) that investing adequate financial resources at the school level plays a major role in determining the quality of education provided by the school and learners' educational outcomes. Study findings also demonstrated that introducing the Free Education policy from ECE through the secondary level has increased access to schooling for many vulnerable children across the country.

To support the increased demand for education, GRZ has made efforts to improve the quality of education by employing additional teachers, constructing extra classrooms, purchasing desks, and so on. However, the quality of education remains below the standard required to deliver high-quality free education for all Zambian learners in the public education system. Study findings showed that despite the government's absorption and coverage of learner tuition and examination fees, many associated costs are still paid by households and continue to pose a significant burden.

The overall objective of the study was to support GRZ in developing a costing framework that reconciles school- and household-based costs of educating children through the public school system while factoring in institutional type and spatial considerations for rural, urban, and remote areas. This costing framework can then be taken forward and systematised into regular review processes to generate updated data, enabling GRZ to continue advocacy that drives towards equitable financing for schools and supports more effective implementation of the Free Education policy.

Household-based costs in urban areas were higher than for households with learners attending rural and remote schools. However, this may be compensated for by greater income opportunities for urban households. It is, however, worth noting that the expansion of the Free Education policy and the associated increase in GRZ grants to schools to cover school-based costs have enabled schools to operate and reduced a portion of the financial burden on households.

This study therefore makes the following recommendations:

General Recommendations

- Grants given to schools to run and manage schools were shown to be lower than required to deliver quality education at all levels. Specifically, the study's findings indicate that the amount of government funding for school-based costs is insufficient relative to the actual costs of inputs required at the school level to provide quality education in Zambia.
- Therefore, the study recommends that GRZ should increase the amount of funds allocated to each child per year to K2850 per child per year in secondary school and 1360 per child per year in primary school. This increased investment is critical to improving the quality of education for all learners. If needed, this allocation may be gradually increased based on budget constraints.
- MoE should now take forward the findings of this study and use the unit costing to advocate to decision makers and other key stakeholders to increase investments in nutrition so that all of Zambia's learners can access quality education.
- To ensure increased financial accountability, MoE should work together with the Ministry of Finance and other relevant sectors to implement a budget tracking system that provides visibility into the disbursement and utilisation of funds towards the education sector.
- MoE should take this costing framework forward regularly and systematically to update the unit cost of education regularly and ensure that this data is used to promote evidence-based advocacy for an increased budget allocation to the education sector over the long term in support of the Free Education Policy. It may also consider a more nuanced approach to costing in the future, which conducts a deeper assessment of the unit cost of delivering education in remote areas, where access to quality education is most difficult.
- MoE should continue to engage CPs and NGOs as key partners in the provision of education, in particular around strengthening the provision of quality education, infrastructure development and support to other complementary programming.
- Communities and other stakeholders should be better engaged within the education planning and delivery

processes, including through Parent Teacher Committees and other mechanisms, to help strengthen governance and accountability within the public education system. This can be done by advocating for the reintroduction of limited PTC fees so that PTCs are reenergised, increasing community ownership and responsibility through cost sharing in the provision of education. As much as possible, this may involve a public-private partnership to co-finance the provision of education, among other measures.

- To ensure that the needs of differently abled learners who need more support are catered for, MoE, CPs, NGOs and other stakeholders must work together to ensure that funding allocations take into account the diverse needs of pupils by gender and schools with persons living with disability (PLWD). Addressing disparities in financial

  The needs of PLWDs, girls, and boys in schools are essential for promoting real equity and inclusivity in education.

- Study findings report that the value of school grants disbursed does not always correspond to the expected school grant based on the number of learners, forcing schools to operate with fewer resources than anticipated. This study recommends that school grant values be calculated and recalculated periodically to ensure the expected grant value aligns with the number of students at the school. GRZ is then responsible for disbursing the assigned value to ensure the consistent delivery of education services.

School-Based Cost Recommendations: Location & Infrastructure

- This study reemphasises the need for deliberate policy that will promote infrastructure development to support the growing number of learners that schools are educating. Adequate infrastructure is critical to ensuring children have access to a conducive learning environment. This helps learners to concentrate and transition academically.

- Other studies have shown that distance to school affects access to quality education, which was still cited by all learners as one of the barriers for learners to accessing education, especially in rural and remote places, which implies that not all eligible children are in school due to distance to the nearest school. The study recommends that the government continue accelerated investment into infrastructure development, particularly the construction of low-cost classroom blocks within the 5-kilometre radius recommended by the government. Shorter distances to school will improve access to education for all learners. The construction of more classroom

blocks will also help reduce overcrowding in classrooms in most public schools, which has compromised the quality of education, especially in primary schools.

- The study has shown that the location of schools can greatly affect the cost of educating a child. As a result, the Ministry of Education is recommended to consider the geographic location of schools when allocating funds. This means that funds should be distributed based on whether a school is located in an urban, rural, or remote area. Since schools in these areas face distinct challenges in providing education to children, it is important to take these factors into account when allocating resources.
- There was a recognition of the importance of parent and community involvement in supporting schools. This included supporting school-based programmes, contributing to infrastructure development and maintaining school facilities. Local education authorities should engage with communities to understand and operationalise potential opportunities and entry points for receiving support. This may include mobilising locally raised resources such as construction materials and artisans to expand or improve school spaces.

Curriculum and Materials

- As a part of the increased per student grant, focus must be maintained on procuring textbooks, teaching aids and other learning materials so that classes have adequate learning resources--the ideal ratio for textbooks and learners is 1:2, anything less than that makes learning challenging. Additionally, the study establishes the need for more play and stimulation materials for Early Childhood Education. Investment in early learning is also key if learners are to develop fully.
- Priority must also be given to strengthening the existing education curriculum to include updated information and innovations, address the changing issues, and incorporate updated teaching methodologies to ensure that an education for the modern world is being provided.

Cost Mitigation and Supplementation

- The government should consider introducing a levy on education to help moderate cost drivers, which remain a hindrance to some families. If effectively implemented, the education levy will directly go to supporting education access and quality. This levy could also be used to support community schools, where free education remains a challenge as they do not receive any government funds.
- The Government should further review opportunities for innovative and/or pilot programmes that leverage technology in the delivery of

education, in particular for rural and remote schools where employing and retaining teaching staff is the most challenging.

- Government should consider engaging NGOs or the private sector to support programming that targets adolescent health and provides much-needed sanitary infrastructure. Unmet needs for menstrual hygiene serve as a barrier to school attendance by female students, and the cost to the household may also be alleviated through the provision of supplies.
- The government should consider increasing the luxury tax/levy on goods such as beer and tobacco, and ringfencing the additional revenue to support further investments in the education sector.
- MoE should develop a Private Sector Corporate Social Responsibility Strategy and guidance documents that build the case for business support to public education. This could include contributions to capital investment in infrastructure, school supplies such as desks, teaching and reading materials, and sanitation facilities, as well as highlighting opportunities for sponsorship of schools and extracurricular activities.

Other Costs

- Schools should look to sponsors from the community or private sector to support extra-curricular activities, school trips, and other school costs. These extracurricular activities are critical as they help students expand their horizons, supplement the classroom experience to improve learning, and provide opportunities to engage in other experiences.
- Although often left as one of the last things purchased, cleaning supplies, water and sanitation agents affect the condition of learning and should not be deprioritised as schools operate.

Recommendations to Alleviate Household-Based Costs

- The government should consider scaling up school feeding programmes across all public schools. The government can utilise recommendations from an evaluation of the Home-Grown School Meals programme, which found that low-cost, nutritious school meals contribute to improved attendance. A school meal also helps improve attention in the classroom, as the learner is less likely to be hungry. The study also recommends greater support for implementing the school health and nutrition curriculum, as only a few schools have a feeding programme.
- Community engagement programmes, frequently funded by CPs, may be implemented to engage local farmers as suppliers of food towards school meals programmes, or as informal educators/partners as they support schools with school-run agricultural activities.

- The GRZ introduced the Constituency Development Fund (CDF) as a part of the devolution of power from the Central Government to the benefit of the citizens at a lower level. It is recommended that various district- and community-level stakeholders be sensitised to the acquisition of funds from the CDF, which would help reduce the cost of education.

Other Recommendations

The study shows that, on average, the cost of educating a child is high in private schools and some church-run schools, depending on the school funding model. Although not all private schools draw learners from high-income communities, the MoE should work with the private school sector, including through the Independent Schools Association of Zambia, to encourage private schools to offer scholarships to low-income/ vulnerable students.

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KISWAHILI
nature corner

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Appendices

Annex 1

GANTT Chat

Ghantt Chart for the Costing Exercise to Establish the Cost of Education for a Child in a Public School in Zambia															
Duration: December 2023 - February, 2004															
Deliverable (s) and Activities	Responsible/ Involved	Month 1				Month 2				Month 3					
*W=Week		W 1	W 2	W 3	W 4	W 1	W 2	W 3	W 4	W 1	W 2	W 3	W 4		
Deliverable 1: Conduct a literature review of the key references shared under section 7 of the request															
a. Desk review of key references and cross-country literature	Hotline Consulting	x	x												
b. Half-day meeting for presentation of findings with the core stakeholders	Hotline Consulting, EDGE, FCDO, GRZ	x													
Deliverable 2: Inception report outlining understanding of the request and approach that will be used to execute the task. This includes sharing the sampling design and scope of the investigation;															
a. Report writing	Hotline Consulting	x													
b. Presentation of the IR to EDGE, FCDO at the study inception meeting	Hotline Consulting		x												
Deliverable 3: Entrance meeting engaging the GRZ (key line ministries) to familiarise and involve them in the data gathering efforts;															
a. Conduct national level entry meetings	Hotline Consulting, GRZ, FCDO		x												
b. Conduct entry meetings at provincial and district level engaging the GRZ (key line ministries)	Hotline Consulting, GRZ			x											
Deliverable 4: Estimate of the financing required to provide a quality education under the EFA policy;															
a. Training of data collection supervisors	Hotline Consulting			x											
b. Conduct data collection; Key Informant Interviews (KIIs) and FGDs	Hotline Consulting				x	x	x								
c. Conduct analysis of data collected	Hotline Consulting							x	x						

Deliverable 5: Development of the Costing framework that reconciles school and household-based costs (uniforms, supplies, transport, food and other expenses necessary to send their children to school) while factoring in institutional type and spatial considerations (Rural, urban and remoteness);													
a. Development of the costing framework	Hotline Consulting					x	x	x					
b. Development of guidelines for the costing framework	Hotline Consulting							x	x				
Deliverable 6: Presentation of emerging findings to EDGE project and FCDO;													
Consultative and validation meeting	Hotline Consulting										x		
Deliverable 8: Session for the GRZ to familiarise with and use the costing framework to inform equitable financing for schools;	Hotline Consulting, FCDO												
a. Hold orientation and capacity building session for GRZ representatives	Hotline Consulting									x			
Deliverable 9: Final report and presentation; and													
a. Final report writing	Hotline Consulting									x			
b. Submission and presentation of the report	Hotline Consulting, EDGE, FCDO									x	x		
Deliverable 10: *Main consultancy report that clearly represents the finding across the objectives outlined.*													
a. Printing, e-publishing of the final study report, costing framework and guidelines	Hotline Consulting									x	x		
b. Host a one-day high level meeting for the dissemination of final study report, costing framework and guidelines to EDGE, FCDO and GRZ lines ministries	Hotline Consulting										x		
Consultative and validation meeting	Hotline Consulting										x		
Note (s): Involved stakeholders relate to those that are key for the execution of the planned activity													

Annex 2

Collection Tools

1. Interview Guide for Parent Teacher Committees and Headmen	Interview Guide for PTCs and Head Teac
2. Interview Guide for MOE and Other GRZ line Ministries (Policy Makers)	Qualitative Data Collection Tool Unit
3. SCHOOL Data Collection Sheet on Unit Cost-	Data Collection Sheet Unit Cost.doc
4. Focus Group Discussion Guide- Learners	Focus Group Discussion for Learn
5. Qualitative Data Collection on Unit Cost: CSOs	Qualitative Data Collection Tool Unit
6. General Questionnaire Headteachers, Parents, teachers, others etc.	Questionnaire General for Unit Co

Annex 3

Ministry Of Education Clearance Letter

All communications should be addressed to:
The Permanent Secretary, Ministry of Education
Not to any individual by name

Telephone: 250655/ 251315/ 251283
251293/ 211318/ 251291
251003/ 251319

REPUBLIC OF ZAMBIA
MINISTRY OF EDUCATION

In reply please quote
No.....

MOE/6/7/20

P. O. Box 50093
LUSAKA

22nd January, 2024

The Country Director
British Council
Zambia and Zimbabwe
P.O Box 34571
LUSAKA

RE: REQUEST FOR PERMISSION TO ACCESS SCHOOLS FOR THE PURPOSES OF CONDUCTING A BRITISH COUNCIL FUNDED STUDY

Reference is made to the above subject matter.

My office is in receipt of your letter dated 3rd January, 2023 in which you requested to be granted permission to access schools in selected provinces and districts in order to carry out a study to help illuminate and understand the cost of educating a learner in light of the government's Free Education Policy.

It is gratifying that organisations like yours are coming on board to help Government have research-based information about the cost of educating a learner so that informed decisions can be made. In view of the foregoing, permission is therefore granted for you to go ahead with your studies in selected districts of Southern, Lusaka, Eastern, Copperbelt and Luapula Provinces as indicated in your letter. However, I wish to guide that teaching and learning programmes in schools should not be disrupted during your school visits.

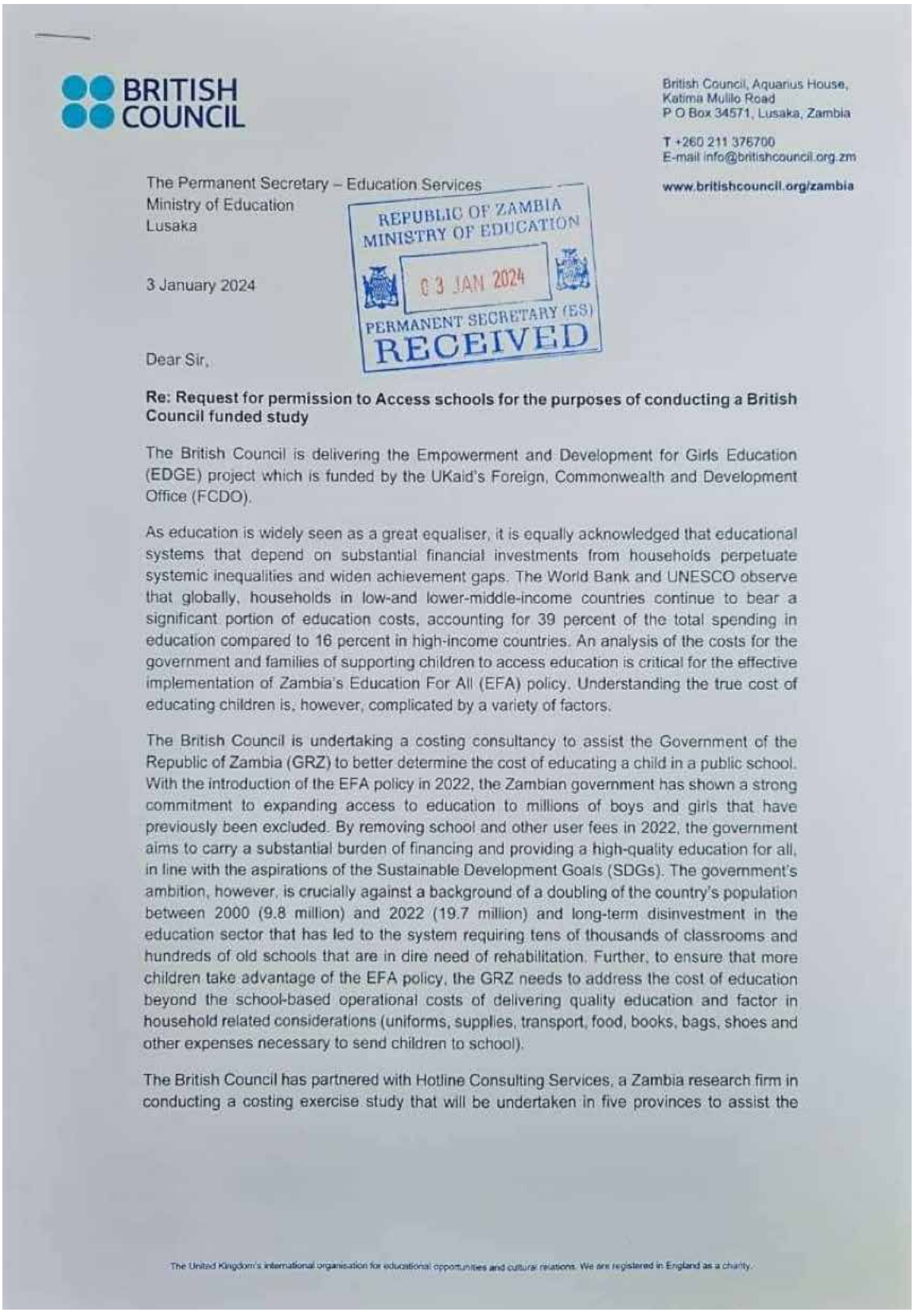
You are further guided that your research teams should present themselves to the education authorities both at provincial and district levels before proceeding to schools. By copy of this letter, the Provincial Education Officers: Southern, Lusaka, Eastern, Copperbelt and Luapula are informed accordingly.

Joel Kamoko (Mr.)
Permanent Secretary – Educational Services
MINISTRY OF EDUCATION

cc. The Provincial Education Officers:
Copperbelt Province, **NDOLA**
Eastern Province, **CHIPATA**
Luapula Province, **MANSA**
Lusaka Province, **LUSAKA**
Southern Province, **CHOMA**

Annex 4

British Council Approval Letter



BRITISH COUNCIL

British Council, Aquarius House,
Katima Mulilo Road
P O Box 34571, Lusaka, Zambia

T +260 211 376700
E-mail info@britishcouncil.org.zm

www.britishcouncil.org/zambia

The Permanent Secretary – Education Services
Ministry of Education
Lusaka

REPUBLIC OF ZAMBIA
MINISTRY OF EDUCATION
03 JAN 2024
PERMANENT SECRETARY (ES)
RECEIVED

3 January 2024

Dear Sir,

Re: Request for permission to Access schools for the purposes of conducting a British Council funded study

The British Council is delivering the Empowerment and Development for Girls Education (EDGE) project which is funded by the UKaid's Foreign, Commonwealth and Development Office (FCDO).

As education is widely seen as a great equaliser, it is equally acknowledged that educational systems that depend on substantial financial investments from households perpetuate systemic inequalities and widen achievement gaps. The World Bank and UNESCO observe that globally, households in low-and lower-middle-income countries continue to bear a significant portion of education costs, accounting for 39 percent of the total spending in education compared to 16 percent in high-income countries. An analysis of the costs for the government and families of supporting children to access education is critical for the effective implementation of Zambia's Education For All (EFA) policy. Understanding the true cost of educating children is, however, complicated by a variety of factors.

The British Council is undertaking a costing consultancy to assist the Government of the Republic of Zambia (GRZ) to better determine the cost of educating a child in a public school. With the introduction of the EFA policy in 2022, the Zambian government has shown a strong commitment to expanding access to education to millions of boys and girls that have previously been excluded. By removing school and other user fees in 2022, the government aims to carry a substantial burden of financing and providing a high-quality education for all, in line with the aspirations of the Sustainable Development Goals (SDGs). The government's ambition, however, is crucially against a background of a doubling of the country's population between 2000 (9.8 million) and 2022 (19.7 million) and long-term disinvestment in the education sector that has led to the system requiring tens of thousands of classrooms and hundreds of old schools that are in dire need of rehabilitation. Further, to ensure that more children take advantage of the EFA policy, the GRZ needs to address the cost of education beyond the school-based operational costs of delivering quality education and factor in household related considerations (uniforms, supplies, transport, food, books, bags, shoes and other expenses necessary to send children to school).

The British Council has partnered with Hotline Consulting Services, a Zambia research firm in conducting a costing exercise study that will be undertaken in five provinces to assist the

The United Kingdom's international organisation for educational opportunities and cultural relations. We are registered in England as a charity.

Annex 5

Ethical Clearance Approval Letter

THE UNIVERSITY OF ZAMBIA
DIRECTORATE OF RESEARCH AND GRADUATE STUDIES

Great East Road Campus | P.O. Box 32379 | Lusaka10101 | Tel: +260-211-290 258/291 777 Fax: (+260)-211-290 258/253 952 | E-mail: director.drgs@unza.zm | Website: www.unza.zm

APPROVAL OF STUDY

IORG No. 0005376 HSSREC IRB No. 00006464
REF NO. HSSREC-2024-JAN-043

6th February, 2024

Dr. Remmy Mukonka
Hotline Consulting
LUSAKA

Dear Dr. Mukonka

RE: "COSTING EXERCISE TO DETERMINE BETTER THE COST OF EDUCATING PER CHILD IN PUBLIC SCHOOLS INZAMBIA"

Reference is made to your submission of the protocol captioned above. The HSSREC resolved to approve this study and your participation as Principal Investigator for a period of one year.

REVIEW TYPE	ORDINARY REVIEW	APPROVAL NO. HSSREC:- 2024- JAN - 043
Approval and Expiry Date	Approval Date: 6th February, 2024	Expiry Date: 5th February, 2025
Protocol Version and Date	Version - Nil.	5th February, 2025
Information Sheet, Consent Forms and Dates	English.	To be provided
Consent form ID and Date	Version - Nil	To be provided
Recruitment Materials	Nil	Nil
Other Study Documents	Questionnaire.	
Number of Participants		
Approved for Study		

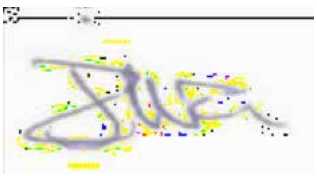
Specific conditions will apply to this approval. As Principal Investigator it is your responsibility to ensure that the contents of this letter are adhered to. If these are not adhered to, the approval may be suspended. Should the study be suspended, study sponsors and other regulatory authorities will be informed.

CONDITIONS OF APPROVAL

- No participant may be involved in any study procedure prior to the study approval or after the expiration date.
- All unanticipated or Serious Adverse Events (SAEs) must be reported to HSSREC within 5 days.
- All protocol modifications must be approved by HSSREC prior to implementation unless they are intended to reduce risk (but must still be reported for approval). Modifications will include any change of investigator/s or site address.
- All protocol deviations must be reported to HSSREC within 5 working days.
- All recruitment materials must be approved by HSSREC prior to being used.
- Principal investigators are responsible for initiating Continuing Review proceedings. HSSREC will only approve a study for a period of 12 months.
- It is the responsibility of the PI to renew their ethics approval through a renewal application to HSSREC.
- Where the PI desires to extend the study after expiry of the study period, documents for study extension must be received by HSSREC at least 30 days before the expiry date. This is for the purpose of facilitating the review process. Documents received within 30 days after expiry will be labelled "late submissions" and will incur a penalty fee of K500.00. No study shall be renewed whose documents are submitted for renewal 30 days after expiry of the certificate.
- Every 6 (six) months a progress report form supplied by The University of Zambia Humanities and Social Sciences Research Ethics Committee as an IRB must be filled in and submitted to us. There is a penalty of K500.00 for failure to submit the report.
- When closing a project, the PI is responsible for notifying, in writing or using the Research Ethics and Management Online (REMO), both HSSREC and the National Health Research Authority (NHRA) when ethics certification is no longer required for a project.
- In order to close an approved study, a Closing Report must be submitted in writing or through the REMO system. A Closing Report should be filed when data collection has ended and the study team will no longer be using human participants or animals or secondary data or have any direct or indirect contact with the research participants or animals for the study.
- Filing a closing report (rather than just letting your approval lapse) is important as it assists HSSREC in efficiently tracking and reporting on projects. Note that some funding agencies and sponsors require a notice of closure from the IRB which had approved the study and can only be generated after the Closing Report has been filed.
- A reprint of this letter shall be done at a fee.
- All protocol modifications must be approved by HSSREC by way of an application for an amendment prior to implementation unless they are intended to reduce risk (but must still be reported for approval). Modifications will include any change of investigator/s or site address or methodology and methods. Many modifications entail minimal risk adjustments to a protocol and/or consent form and can be made on an Expedited basis (via the IRB Chair). Some examples are: format changes, correcting spelling errors, adding key personnel, minor changes to questionnaires, recruiting and changes, and so forth. Other, more substantive changes, especially those that may alter the risk-benefit ratio, may require Full Board review. In all cases, except where noted above regarding subject safety, any changes to any protocol document or procedure must first be approved by HSSREC before they can be implemented.

Should you have any questions regarding anything indicated in this letter, please do not hesitate to get in touch with us at the above indicated address.

On behalf of HSSREC, we would like to wish you all the success as you carry out your study.
Yours faithfully,



Dr. J.I. Ziwa
DR. J. I. Ziwa

CHAIRPERSON
THE UNIVERSITY OF ZAMBIA HUMANITIES AND
SOCIAL SCIENCES RESEARCH ETHICS COMMITTEE - IRB

cc: Director, Directorate of Research and Graduate Studies
Assistant Director (Research), Directorate of Research and Graduate Studies
Assistant Registrar (Research), Directorate of Research and Graduate Studies

Annex 6

Ethical Clearance Approval Letter

HOTLINE Consulting

Ministry of Education Cooperating Partner

.....

Date:

Dear Sir/Madam,

REF: REQUEST FOR AN INTERVIEW WITH TWO OF YOUR TEAM MEMBERS ON THE COST OF EDUCATION PER CHILD IN ZAMBIA

Reference is given to the caption above.

The British Council through its Empowerment and Development for Girls Education (EDGE) project in Zambia working in Partnership with the Ministry of Education has partnered with Hotline Consulting Services, a Zambian research firm in conducting a costing exercise study that is being undertaken in five provinces to assist the Ministry of Education to better determine the cost of educating a child within the public school system in the face of free education policy. This is in line with the Education for All (EFA) policy.

I am writing to request for an interview this week not exceeding 60 minutes or less with one key policy officer or any other suitable person to answer questions on the cost of education and support mechanisms available. We are requesting to interview at least a Planner responsible with budgeting and any Human Resource personnel. We are available on a day and time suitable to you and/or the assigned personnel.

I have attached the guide to which the respondent will be answering to. Kindly contact us back on 0966412171 should you require to.

Yours Faithfully,

Kumbutso Phiri,
Research Coordinator
/For the CEO

Plot #6, Lunzua Road, Off Addis Ababa Drive, Lusaka Cell:+260 977 788 714 / +260 966 598 090 Email:hotlineconsult2023@gmail.com

Generating Knowledge For Development

Annex 7

Sample Of Consent Form

THE UNIVERSITY OF ZAMBIA
DIRECTORATE OF RESEARCH AND GRADUATE STUDIES

HUMANITIES AND SOCIAL SCIENCES RESEARCH ETHICS C OMMITTEE

Telephone: +260-211-290258/293937 | Fax: +260-211-290258/293937| P. O. Box 32379 Lusaka, Zambia
Email: drgs@unza.zm

CONSENT FORM
(Translated into vernacular if necessary)

TITLE OF RESEARCH:
Costing Exercise to Better Determine the Cost of Educating Per Child in Public Schools in Zambia.

REFERENCE TO PARTICIPANT INFORMATION SHEET:

1. Make sure that you read the Information Sheet carefully, or that it has been explained to you to your satisfaction.
2. Your permission is required if tape or audio recording is being used.
3. Your participation in this research is entirely voluntary, i.e. you do not have to participate if you do not wish to.
4. Refusal to take part will involve no penalty or loss of services to which you are otherwise entitled.
5. If you decide to take part, you are still free to withdraw at any time without penalty or loss of services and without giving a reason for your withdrawal.
6. You may choose not to answer particular questions that are asked in the study. If there is anything that you would prefer not to discuss, please feel free to say so.
7. The information collected in this interview will be kept strictly confidential.
8. If you choose to participate in this research study, your signed consent is required below before I proceed with the interview with you.

VOLUNTARY CONSENT
I have read (or have had explained to me) the information about this research as contained in the Participant Information Sheet. I have had the opportunity to ask questions about it and any questions I have asked have been answered to my satisfaction.

I now consent voluntarily to be a participant in this project and understand that I have the right to end the interview at any time, and to choose not to answer particular questions that are asked in the study.

My signature below says that I am willing to participate in this research:

Participant's name (Printed):.....

Participant's signature: Consent Date:.....

Researcher Conducting Informed Consent (Printed): Hotline Consulting

Signature of Researcher: ..... Date: .....

Signature of parent/guardian:..... Date:.....

Annex 5

Ethical Clearance Approval Letter

THE UNIVERSITY OF ZAMBIA
DIRECTORATE OF RESEARCH AND GRADUATE STUDIES

Great East Road Campus | P.O. Box 32379 | Lusaka10101 | Tel: +260-211-290 258/291 777 Fax: (+260)-211-290 258/253 952 | E-mail: director.drgs@unza.zm | Website: www.unza.zm

APPROVAL OF STUDY

IORG No. 0005376 HSSREC IRB No. 00006464
REF NO. HSSREC-2024-JAN-043

6th February, 2024

Dr. Remmy Mukonka
Hotline Consulting
LUSAKA

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Approved for Study		

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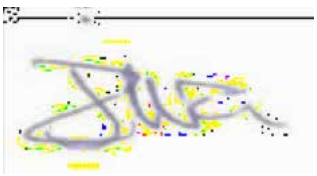
On behalf of HSSREC, we would like to wish you all the success as you carry out your study.
Yours faithfully,



Dr. J.I. Ziwa
DR. J. I. Ziwa

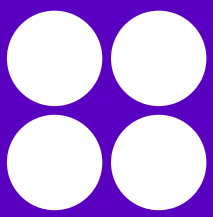
CHAIRPERSON
THE UNIVERSITY OF ZAMBIA HUMANITIES AND
SOCIAL SCIENCES RESEARCH ETHICS COMMITTEE - IRB

cc: Director, Directorate of Research and Graduate Studies
Assistant Director (Research), Directorate of Research and Graduate Studies
Assistant Registrar (Research), Directorate of Research and Graduate Studies

Annex 8

Bios For The Core Study Team

Name	Qualifications	Role	Area of Expertise/Skill
Prof. Gift Masaiti	✓ PhD- Economics of Education & Management ✓ Master of Education ✓ Bachelor of Education-Mathematics ✓ Diploma in Education-Mathematics ✓ Certificate in Project Planning and Management.	Co-Consultant	• Economics and Management of Education • Financing of Education • Higher Education • Economics and Public Policy • Student Finance, Loan Policies & Governance • Teacher Education & Management • Education Efficiencies • Educational Research and Statistics • Educational Planning through Computer Simulation • Comparative Higher Education • Education Evaluation (M & E) • Education Policy • Quantitative Researcher • Proficient at writing, analysis, SPSS, Stata • Computer Simulations
Dr. Remmy Munkonka	✓ Doctor of Philosophy (PhD) – ✓ Master of Public Administration ✓ Bachelor of Education ✓ Dip Education ✓ Cert Education	Lead-consultant	• Qualitative Researcher • Teacher Training • Higher Education • Public policy • Educational management and planning • Public Expenditure and controls • Economics • Teaching • Proficient at writing, analysis of data using SPSS. • Monitoring and Evaluation • Good governance
Dr. Audrey Mwansa	✓ Doctorate Degree in International Education and Development	Co-Consultant	• Strong leadership qualities and facilitation skills, experience working with teachers. • Vast experience in policy and research
Dr. Audrey Mwansa	✓ Master of Science in Educational Management ✓ Advanced Diploma in Education National ✓ BA degree in Sociology and Geography (additional course in Economics) ✓ Teaching Certificate in Education Charles Lwanga	Co-Consultant	• Vast experience leading educational and development research within Zambia and the region. • Gender and inclusivity expert • Experience working with the Zambian higher education sector at university level • Vast experience coordinating donor-funded programs and activities as • Technical Advisor and Deputy Chief of Party level in USAID funded projects, Education Advisor with the Embassy of Ireland and National • Adviser with the British Council DFID funded technical assistance program in Zambia. • Experience working with universities in Rwanda and understands the Rwandan education support programs to education particularly the Leadership for Learning activities. • Has extensive knowledge in designing programmes in scholarship provision especially to needy students • Has the ability to handle relations with various audiences, such as the media, local community, political organizations and government. • Has the ability to multi-task and successfully juggle competing priorities to attain the project goals • Has excellent computer skills with expertise in Spreadsheet, SPSS for windows, Nvivo software for qualitative research data, Power-point, and Use of electronic mail and internet, zoom, Skype, WhatsApp, delivery of online lectures through Moddle



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