

Evaluating the Effectiveness of the Malawi Primary Education Policy within the context of the SDGs

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DECLARATION

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Abstract

Education is considered one of the most important keys to the development of a country. Leaders worldwide concur with this notion and this is why nations have undergone various education reforms over time. The year 1994 was of particular historical significance to the nation of Malawi as it was the year that free primary education was introduced. This was as a result of Malawi's participation in the international Jomtien conference in 1990. Since 1990 Malawi has since been a member of a number of international coalitions aimed at tackling development agendas such as the Millennium Development Goals (MDG) and the more recent Sustainable Development Goals (SDG). Through such coalitions, the nation has adapted and refined its policies.

The purpose of this study is to evaluate the effectiveness of the Malawi primary education policy, given the considerable number of years since the introduction of the free primary education policy in Malawi, to determine the extent to which it gives effect to the Sustainable Development Goals for education policy over time. A longitudinal approach was adopted in order to observe the effectiveness of the policy since its introduction in 1994.

The study commences by providing an overview of the notion of development and how it has evolved over time. A linkage is then identified through the literature review on how education is a means to development. Various internationally recognised education indicators which form the basis for measuring success in education were discussed and further narrowed down for the purposes of this research.

The study tracked selected input, process and results indicators in the education system as a means of reviewing progress in the achievement of the education policy and development results over the implementation period of the free primary education policy. The study was limited to the secondary data available in the public domain, primarily from UNESCO and the World bank. The results suggest that the policy is working to a certain degree; however, challenges remain in terms of funding and successful implementation of the policy. On the basis of such findings, the main recommendations provided in the thesis are aimed to improve the implementation process.

Opsomming

Onderwys word as een van die belangrikste sleutels tot die ontwikkeling van 'n land gesien. Leiers wêreldwyd gaan akkoord met hierdie opvatting en dit is waarom nasies oor tyd verskeie onderwys hervormings ondergaan het. Die jaar 1994 was van besondere historiese belang vir die burgers van Malawi, aangesien dit die jaar was wat gratis primêre onderwys ingestel is. Dit was 'n gevolg van Malawi se deelname aan die internasionale Jomtien-konferensie in 1990. Na aanleiding van die internasionale koalisie van 1990 en sedertdien het Malawi 'n lid van 'n aantal internasionale koalisies, gerig op die aanpak van ontwikkelingsagendas soos die Millenniumontwikkelingsdoelwitte (MDG's) en die meer onlangse Volhoubare Ontwikkelingsdoelwitte (SDG's), geword. Vanweë sodanige koalisies kon die land sy beleid aanpas en verfyn.

Die doel van hierdie studie is om die doeltreffendheid van die Malawi- primêre onderwysbeleid te evalueer, gegewe die aansienlike aantal jare wat verloop het sedert die instelling van die beleid oor gratis primêre onderwys in Malawi, ten einde te bepaal in watter mate dit oor tyd uitvoering aan die SDG's vir onderwysbeleid gegee het. 'n Longitudinale benadering is gevolg om die doeltreffendheid van die beleid sedert die instelling daarvan in 1994 te evalueer.

Die studie begin met 'n oorsig oor die idee van ontwikkeling en hoe dit oor tyd ontvou het. Vervolgens word 'n verband aan die hand van 'n literatuuroorsig aangedui met onderwys se rol as ontwikkelingsmiddel. Verskeie internasionaal erkende onderwysaanwysers, wat die basis vir die meting van onderwysukses vorm, word bespreek en verder verfyn vir die doeleindes van hierdie navorsing.

Die studie ondersoek geselekteerde inset-, proses- en resultaat aanwysers in die onderwysstelsel as 'n wyse om die vordering met die bereiking van die onderwysbeleid en die ontwikkelingsresultate oor die implementeringstydperk van die gratis primêre onderwysbeleid te hersien. Die studie is beperk tot die sekondêre data wat in die openbare domein beskikbaar is, hoofsaaklik van UNESCO en die Wêreldbank. Die resultate wys dat die beleid tot 'n mate werk, alhoewel uitdagings bestaan wat betref die befondsing en suksesvolle implementering daarvan. Gegrand op sodanige bevindings is die hoofaanbevelings in die verhandeling daarop gemik om die implementeringsproses te verbeter.

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Chapter 1: Introduction and Background to the Study

1.1 Background

The importance of education for all children is widely recognised in the international community. Leaders worldwide concur with this notion and this has been evidently revealed in times past, through the world leaders' participation in the Jomtien Conference, which took place in Jomtien, Thailand in 1990. The Jomtien Conference aimed to discuss nations' pledge to universal primary education, with delegations consisting of policy makers, specialists in education, development agencies and leaders of 155 countries (King, 2011a). This unprecedented international cooperation led to the development of goals in education that had specific policy implications for different countries, which necessitated each country to having a plan and taking an action (UNESCO, 1990:6).

In response to the Jomtien conference, Malawi was one of the first country in sub-Saharan Africa to take a bold step and adopt a policy on free primary education (Chimombo, 2009:297). The Jomtien conference initiated and led to the implementation of other international agendas and education movements over the course of time (United Nations, 2015a) – for instance, Education for All (EFA), Millennium Development Goals (MDG) and the most recently and globally adopted Sustainable Development Goals (SDG). Given the considerable number of years since the introduction of the primary education policy in Malawi, it is crucial that a study be conducted on evaluating the effectiveness of the primary education policy to determine the extent to which it gives effect to the Sustainable Development Goals (SDG) for education.

1.2 Research problem and objectives

The research problem of the study undertaken, and the objectives have been summarised in Figure 1.1 and explained further in the sections below.

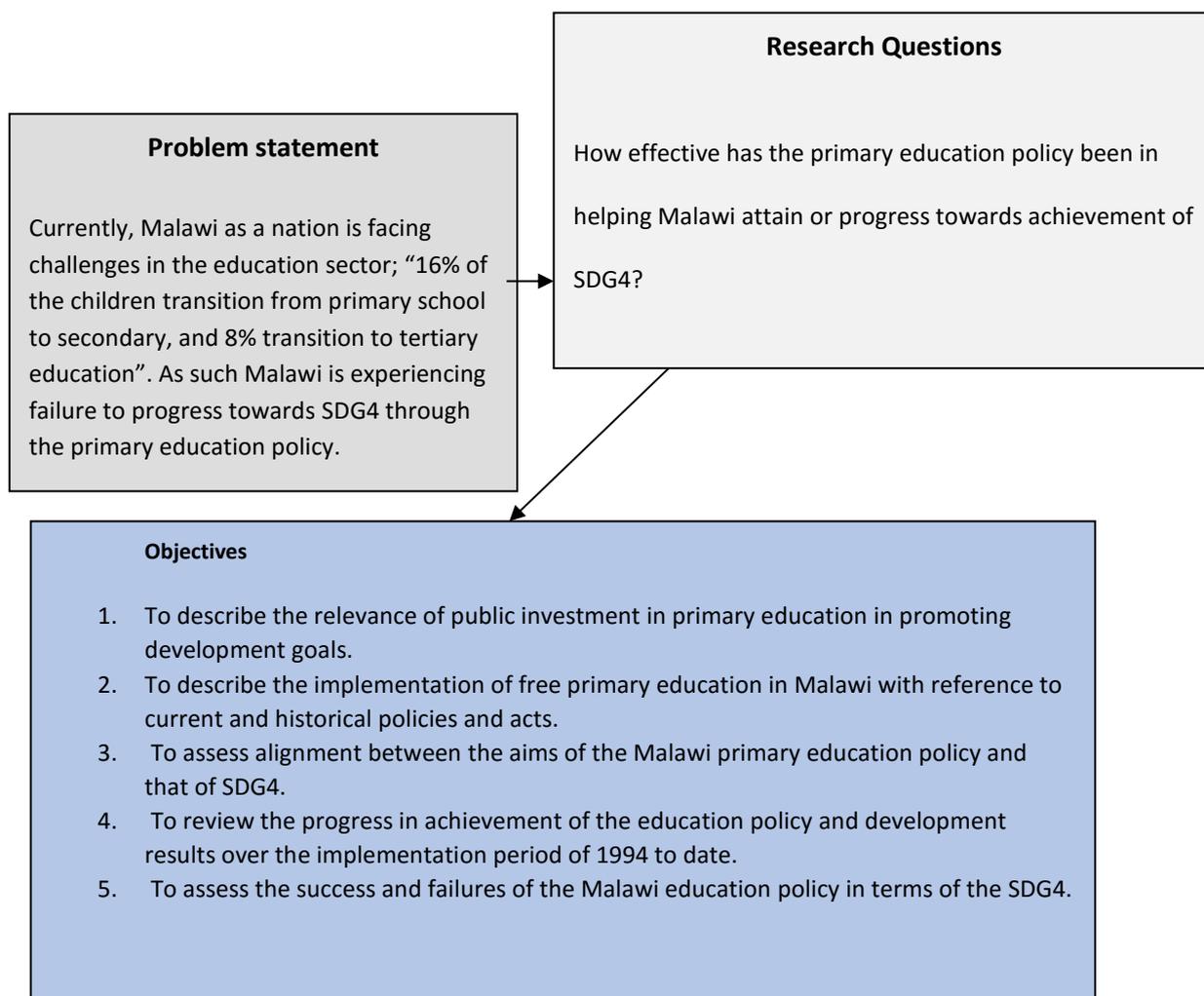


Figure 1.1: Research Problem, Question and Objectives

1.3 Research problem

Internationally, policy makers suggest that education must have a high priority. Emphasis on primary and secondary education has proven to be more promising and ultimately a way out of poverty towards a country's sustainable development (Iiasa, 2008:1). Primary education, like many other forms of education, is fundamental to sustainability (Mckeown, Hopkins, Rizzi & Crystalbride, 2002:12). Rode and Michelsen, (2008:19) acknowledge that education is an essential requirement for sustainable development. Malawi, one of the least developed nations in the world, has a population of over 16 million people, of which 45.1% are under 15 years of age (Country Meters, 2017). The Malawi Growth and Development Strategy (MGDS) acknowledges that education is not only central for the nation's achievement of social economic development but also for long-term investment in human capital development (Malawi, 2017:xviii). Delivering quality primary education to all children is of strategic importance for the country. It is with the right policies and programmes enhancing education opportunities for all that progress can be made as a nation towards a sustainable future (Michelsen & Wells, 2017:8).

In global discussions of sustainability and sustainable development, SDGs have been widely accepted and adopted by different nations, Malawi included. SDGs are a United Nations (UN) initiative that lists 17 global goals. These goals were adopted by 194 countries – including Malawi – of the UN General Assembly (United Nations, 2015a). SDG4 emphasises the need to enable everyone to study, learn and fulfil their potential; the goal is to ensure that there is inclusive and equitable quality education and to promote lifelong learning opportunities for all (United Nations, 2015:11-13). SDG4 further indicates that local governments are particularly well-placed to reach out to vulnerable and marginalized individuals and communities, and to ensure they have access to education and training that meet their needs. The government is accountable for this and is responsible for ensuring the availability and provision of good quality education through the implementing the right policies and maintaining the infrastructure.

A central issue in evaluation of the education system effectively is measuring the quality of education. According to the World Bank, in measuring education quality/learning outcomes for SDG4 as stipulated in the SDG Target 4.6; literacy and numeracy skills are essential for all age groups in order to achieve both individual and national development (World Bank Group, 2017). Research conducted by the United Nations Educational, Scientific and Cultural

Organization (UNESCO) on SDG4 in Malawi provides some staggering statistics which imply that the gap in the education system has yet to be bridged with the right policies and systems. It is sad to note that the proportion of children completing primary education and attaining the minimum level of proficiency in mathematical skills is 40.1%, while the figure for those achieving the minimum proficiency in reading is 63.7%. These statistics are relatively lower compared to more developed societies.

In terms of infrastructure and the basic necessities required for an effective education, Malawi as a country seems to be lagging in the provision of the necessary facilities to enhance the learning process and ultimately achieve positive learning outcomes. For instance, water, sanitation facilities, equipment and electricity are not adequately provided in the schools. As an illustration, in the year 2016 only 18.7% of primary schools had access to electricity. Such statistics prove that the country was not yet in a position to fully provide many other enabling factors for a successful education in all schools.

In addition, another alarming statistics reported in the MGDS III is that as of 2017 only “16% of the children transition from primary school to secondary, and 8% transition to tertiary education” (Malawi, 2017:37). It is clear that the education system needs to be reformed if Malawi is to fully achieve the targets stipulated in SDG4 and evaluating the effectiveness of the primary education policy may be viewed as a prerequisite to initiate that process.

Furthermore, despite the positive step of the introduction of free primary education in Malawi, this development brought with it a lot of challenges which are ongoing in the national education system, especially in the primary sub-sector itself. Enrolment figures increased enormously, thereby putting a lot of pressure on the distribution of teaching and learning materials, the availability of adequately qualified teachers, class space and provision of adequate sanitary facilities (Ministry of Education, Science and Technology, 2013:5).

In addition, one of the impediments of the education system as stated in the African Disability Rights Yearbook (2013) is the lack of adequate schools that provide inclusive education. According to the African Disability Rights Yearbook (2013), Malawi did not meet needs of the disabled children as discussed in the Committee on Economic, Social and Cultural Rights (Committee on ESCR), which comprehensively discussed the four A standards required in education in order to satisfy the basics of availability, accessibility, acceptability and adaptability.

According to the Malawi Growth and Development Strategies, the challenges encountered in primary education can be summed up as follows:

- i. Shortage of qualified primary school teachers,
- ii. Poor strategic management of teachers,
- iii. Inadequate and inferior physical infrastructure,
- iv. Inadequate teaching and learning materials,
- v. Poor monitoring and supervisory systems,
- vi. Poor access for children with special needs,
- vii. Poor retention of girls mainly from Standards Five to Eight,
- viii. Negative impact of HIV/AIDS, and
- ix. Poor participation of school committees and their communities in school management (Ministry of Education Science and Technology, 2008:11).

1.4 Research question

This thesis continues the research commenced by the author as part of Honours-level studies (Sichone, 2017). In order to evaluate the effectiveness of Malawi's primary education policy, one overarching question will be addressed in the study:

- How effective has the primary education policy been in helping Malawi attain or progress towards achievement of SDG4?

1.5 Research objectives

In responding to the research question above, the main objectives of the study are as follows:

1. To describe the relevance of public investment in primary education in promoting development goals;
2. To describe the implementation of free primary education in Malawi with reference to current and historical policies and acts;
3. To compare alignment of the aims of the Malawi primary education policy and those of SDG4;

4. To review the progress in achievement of the education policy and development results over the implementation period from 1994 to date;
5. To assess and critically discuss the success and failures of the Malawi Education Policy results, in the context of the SDG4.

Challenges related to throughput lead to questions about the entire policy on education. This study, which aims to evaluate the effectiveness of the Malawi primary education policy, therefore becomes important within this context. There is a need to better understand the effectiveness of Malawi's primary education policy and whether it results in progression towards achieving the sustainable development goals, specifically SDG4.

1.6 Research design and methodology

The sole purpose of the research is to conduct an outcomes evaluation. Evaluation is defined as the “systematic assessment of the operation and/or the outcomes of a program or policy, compared to a set of explicit or implicit standards, as a means of contributing to the improvement of the program or policy” (Weiss, 1998:4). According to Mouton (2016: 143), the fundamental goal of an outcome evaluation is to provide solutions to question about whether policies, processes and interventions have been conceptualized and implemented appropriately.

In addition, the study also seeks to observe if the target population has been sufficiently covered as originally intended when the policy or intervention was being designed. Winsett (2004:1) acknowledges that in evaluation research there are two questions that need to be asked: has the policy or programme had the intended effect (outcomes), and is the program being delivered as originally intended (processes). Two further elements are identified from these questions about outcomes and processes. On the one hand, outcomes are the results of the policy, while on the other hand, processes are the internal workings of the programme or policy, such as operations which may assist in improving the programme. Evaluation of any policy or programme is a significant aspect (Winsett, 2004:1).

The design of an outcome evaluation may use numerical and textual data and can be analysed using both structural and quantitative methods (Mouton, 2016:143). A literature review on various issues regarding evaluating the effectiveness of policy on primary education policy in Malawi will be undertaken.

Due to the nature of the study being undertaken, the research design and methodology deemed appropriate for the study is that of a longitudinal study. Longitudinal studies employ repetitive measures in order to observe specified individuals or factors over an extended period of time; the period can range from a year to decades, depending on the study being undertaken (Babbie & Mouton, 2001:93). The nature of longitudinal studies is usually observational, with an element of both qualitative and quantitative data collection (Caruana, Roman, Hernández-Sánchez & Solli, 2015).

This type of study was particularly useful in the current research to observe how effective the primary education policy has been over time, and to gauge the progress since the introduction of global agendas such as the SDGs.

A longitudinal study is beneficial for our research for the purpose of providing a more comprehensive understanding of developments and/or variations over time. This study observed changes since the introduction of the free primary education policy in 1994.

The main data source will be secondary data acquired from the UNESCO and World Bank data bank. Some of the indicators as regards to the study will be categorised as follows:

- Quality indicators: pupil-teacher ratio and number of trained teachers;
- Efficiency indicators: the enrolment, repetition, completion and transition rate with consideration to both sexes-male and female respectively.

1.7 Research approach

In graphic terms, the research process is set out in Figure 1.2.

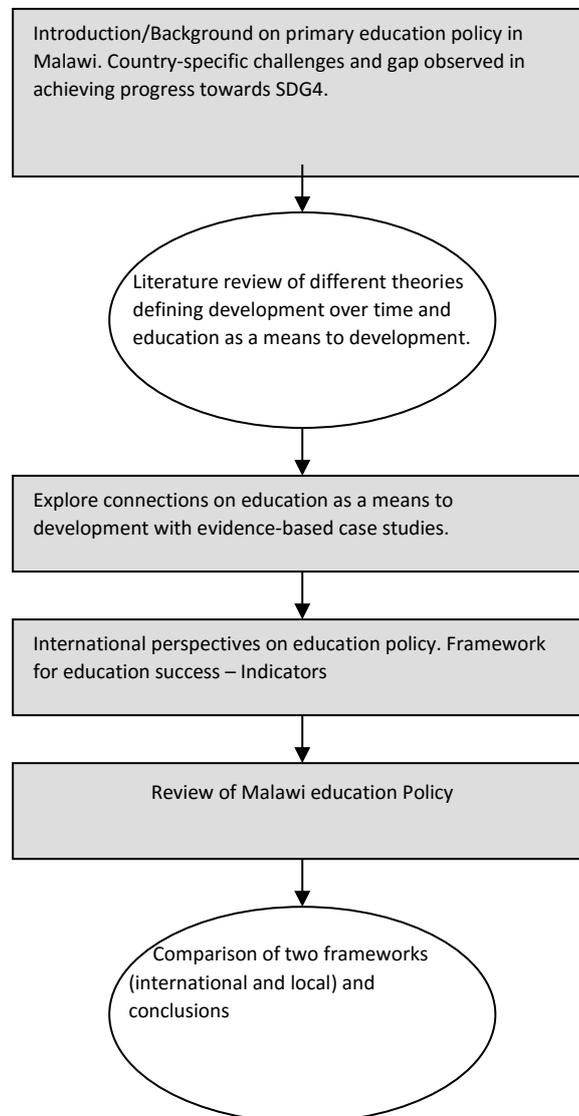


Figure 1.2: Research Study Strategy

1.8 Research constraints

The main limitation of this research lies in the research design and methodology. Even though several potential education indicators exist, access to historical data limited the study analysis only to those indicators with data available from reliable sources in the public domain. The trend analysis of the selected indicators relies to a great extent on data sources such as the UN, World Bank, government documents as well as completed and published studies on the Malawi primary education system. Several attempts were made to gain access to data for the whole study period from the Ministry of Education; but this proved to be a challenge. The Department stated that the Education Management Information System (EMIS) was still in its infancy in the early 2000s and as such it is very unlikely that electronic data would be made available for any period before then. Hence, heavy reliance was placed on UN and World Bank data on selected indicators pertinent to this study. Through document analysis on various research studies on primary education, information is derived to better inform the analysis in cases where data availability was lacking. The scope of the study's analysis is thereby limited to the data available in the public domain.

1.9 Chapter outline

The outline of the research report is provided below.

Chapter 1: Introduction and background of the study

The first chapter sets the scene by providing an introduction and background of the study. It presents the research problem, question, objectives, design and methodology will be presented.

Chapter 2: Literature review

The second chapter aims to address the first research objective which is 'to describe the relevance of public investment in primary education in promoting development goals'. This is done by firstly reviewing the literature which discusses development theory from multiple perspectives and showing the evolution of such theories over time. The chapter will also discuss internationally recognised development agendas such as the MDGs and the more recent SDGs, with a particular focus on SDG4, which is more relevant to our study. In this context a link between education and development is identified. The chapter concludes by discussing SDG4 indicators and various global institutions' indicators as a means of measuring education policy success.

Chapter 3: Legislative and policy framework on education in Malawi

Chapter Three provides a comprehensive background on education policies in Africa and then narrows down to our research area focus, Malawi. As a nation Malawi has undergone various education reforms from the colonial era to its current democratic political dispensation. Various education plans have been in place and the system has been guided by the Constitution as the supreme law of the land. Additionally, the nation is a part of various international agendas and coalition that the nation which have guided the education policies in place. The focus is also on the national education policy objectives at primary education level and its alignment with the global development agenda, particularly SDG4. The chapter concludes with a discussion of the challenges faced in the education system despite the nation having adopted various international commitments with regards to education.

Chapter 4: Research design and methodology

This chapter gives an account of the research design and methodology. A longitudinal approach was adopted which makes use of secondary data. Trends are observed and an analysis of the data is conducted. The indicators identified Chapter 2 and Chapter 3 and the SDG4 target areas support the analysis of the data. Data are presented graphically to aid in the analysis and interpretation of the results. Reference is also made to similar studies to provide a more comprehensive analysis and assist in drawing conclusions for the study.

Chapter 5: Discussion of findings, summary and conclusions

This chapter elaborates on the research findings of how effective the primary education policy has been. The findings identify the education system's success and failures with reference to the literature and the data analysis in Chapter 4. A summary of each research chapter will also be provided to indicate how each research objective is addressed in the corresponding chapter. The chapter will conclude with a few recommendations and concluding remarks.

1.10 Chapter summary

This chapter provided an overview of the essence of the research study undertaken by firstly introducing the subject of the study, which is focused on evaluating Malawi's primary education policy. A brief background on the context of the topic has been provided. The research problem, which is central to the whole research, was discussed. The chapter also outlines the overarching question of the study and the research design and methodology.

2 Chapter 2: Development and Education

2.1 Introduction

This chapter provides a review of the literature on many fundamental constructs of this study. A brief overview of the concept of development and how development has been defined over time will be discussed based on prior studies by various authors. Development is defined from an economic, social, ecological and integrative perspective. The various theories on development inform the current understanding of development and give background to the various development agendas such as the MDG's and SDG's. A key element also discussed in the section is the linkage of education and the vital role it plays in achieving development at the national and international level as depicted in the recent international agenda, namely the SDGs. The concept of education as a means to development will be explored with reference to a few case studies as evidence of the role of education in development. A review on how different scholars perceive primary education in Malawi since the introduction of free primary education will also be made. Thereafter, a comprehensive outline of international indicators for measuring educational success will also be discussed.

2.2 Development

The notion of development is a widely cited and multi-dimensional phenomenon. Over time different authors have developed a variety of views on the concept of development based on their subjective understanding of the world and the time period within which the word development was used (Contreras, 1982:47). The following section will discuss the notion of development from various perspectives, namely: development from an economic growth perspective, development from a social and human development perspective, development from an ecological perspective, and finally an integrated approach to development.

2.2.1 Development from an economic growth perspective

Currently there are numerous definitions of development. Several notable authors and pioneers such as Michael P. Todaro, Akin L. Mobogunje, Karl Marx, Dos Santos and Amartya Sen have made significant contributions in providing clarity about the concept and definition of development.

To begin with, Todaro (1981:56) defines development as “not purely an economic phenomenon but rather a multi-dimensional process involving reorganization and reorientation of an entire

economic and social system". He argues that development is a process that involves improvement of the quality of human lives with three objectives to consider, namely:

1. "Improvement of peoples' living standard: Raising peoples' level of incomes and consumptions, ensure food and nutrition, proper health care and education through relevant growth processes
2. Promotion of human dignity and self-respect: Creating conditions conducive to the growth of peoples' 'self-esteem' and realize their potentials by establishing necessary socio-political and economic infrastructures
3. Enhancement of freedom: Increasing peoples' freedom to choose by enlarging the range of their choice variables i.e. varieties of goods and services and opportunities." (Todaro in Reza, 2016:3).

Todaro's definition is commended for presenting a broader prospective on the concept of development that relates to the economic, political and social dimensions of society (Nsannanira, 2011).

On the other hand, Karl Marx provides an unparalleled contribution to the theory of development which emphasises production and the division of labour. In Marxian theory, economic development is described as a process of value generation (Debasiaash, 2018). Marx viewed the capitalist mode of production involving the employer and employee as resulting in class conflicts; he advocated for nationalization of resources and distribution of returns without discrimination to all classes of people as a way of ensuring growth that is balanced (Reza, 2016:4). Karl Marx was not a proponent of the capitalist system (market economy). He argued that under the capitalist system, the labourers' wage received was less than the actual duration of the work or commodity being produced by the worker (Shah, 2018). Essentially, Marx's observation implied that the capitalist system was unfair as the labourers' input was not proportional to the reward being received by the labourer.

Dos Santos provides a neo-colonial dependence model of development that can be said to be an extension of Marxist theory (Hein, cited by Dang & Sui Pheng, 2015:18). According to this theory, it is argued that the existence of underdevelopment is due to the dominance of developed countries and multinational corporations over developing countries (Dang & Sui

Pheng, 2015:18). He further made comparison with the colonial relationship process (Reza, 2016:4).

Mabogunje offers an alternative viewpoint on development. Mabogunje describes development as economic growth and modernisation, where there is a dual economy and a relationship between the government and its citizens (Reza 2016:3). Economic indicators such as Gross National Product are used for measuring development. “The notion that ‘development’ is synonymous with ‘economic growth’ has, however, been subjected to severe criticism” (Harriss, 2013:4). One of the opponents of this view is Amartya Sen. According to Barder (2012), during the 1980s Amartya Sen revealed his ground-breaking work which posits that poverty involves an extensive range of deprivations which cannot be captured by income alone. Some of those deprivations included are in health, education and living standards. Essentially, Sen views expansion of freedoms as the central and main means to development (Sen, 1999:366). In other words, Sen’s concept of development as freedom argues that human development is about the expansion of citizens’ capabilities – this is also known as the capability approach. Freedom, according to Sen, implies increased access and opportunities for citizens to attain the things that they value (Clifton, 2013).

Most development practitioners view the capability approach as providing a vital analytical and philosophical foundation (Clifton, 2013). Nevertheless, Sen’s views of development, regardless of their significant contribution to the field of development, have not been without critiques. Selwyn (2011) argues that Sen’s views on freedom in capitalist markets is narrow-minded as the market is institutionalized unfreedom, whereby people have little choice or freedom. He further emphasises that Sen seems to concur with Adam Smith’s view of the market as an arena of choice and hardly makes any proposition of policies and practices that are radical, distributive and developmental policies and practices (Selwyn, 2011:75).

Despite the criticisms of Sen’s view on development, Sen’s ‘capabilities approach’ led to the introduction of the United Nations Human Development Index, and later the Poverty Index, both of which aim to measure development in a broader sense (Barder, 2012). By extension, Sen has played an influential role regarding ideas and decisions undertaken by the development actors (Clifton, 2013). Furthermore, the Millennium Development Goals are guided by Sen’s ideas (Clifton, 2013). Sen’s thinking is also evidenced among pre-eminent actors; for example, the former United Nations Secretary-General, Kofi Annan, spoke about freedom and the rights of the poor in his report titled ‘In Larger Freedom’ (2005). He stated that:

“A world of interdependence cannot be safe or just unless people everywhere are freed from want and fear and are able to live in dignity. Today, as never before, the rights of the poor are as fundamental as those of the rich, and a broad understanding of them is as important to the security of the developed world as it is to that of the developing world” (Annan, 2005:6).

2.2.2 Development from a social and human development perspective

The social and human development perspective emerged as a contrasting ideology from economic development theories. The focus is more on non-economic processes such as, among many others, human rights, social inclusion, mainly of the poor and marginalised peoples; people’s wellbeing; approaches that are people-centred; and building coherent and resilient societies (Millington & Browne, 2015:2). Humans are inherently social beings, who are unable to thrive when left to themselves; their nature has a tendency to seek a sense of belonging and interaction with other human beings in the society (Anastasia, 2016). Human development theories seek to explain such behaviours. Prominent thinkers have sought over time to explain human development and how the social aspect factors into it. The term social development, sometimes used synonymously with human development, has been widely used in a variety of disciplines to refer to community-based projects, government policies and programmes, child welfare programmes and in development studies – scholars use it in academic fields such as “sociology, social work and social policy” (Midgley, 2013).

The origins of social development theory can be traced to the works of a prominent Russian psychologist, Lev Vygotsky. Vygotsky’s social development theory on social learning and how it affects a child’s development stressed the essential role that social interaction plays in the development of cognition, he further emphasised on the fundamental role that the community or society plays in the process of “making meaning” (McLeod, 2014). Cognitive development denotes the development that an individual undergoes from the stage of infancy to childhood and then to adulthood with regard to their thought process, problem-solving skills and decision-making abilities (Anastasia, 2016). Three basic premises underlie Vygotsky’s theory:

- “Social interaction: Vygotsky was of the opinion that social learning precedes development;

- The More Knowledgeable Other (KMO): this referred to “anyone who has a better understanding or a higher ability level than the learner, with respect to a particular task, process, or concept”;
- The Zone of Proximal Development (ZPD). The ZPD is the distance between a student’s ability to perform a task under adult guidance and/or with peer collaboration and the student’s ability solving the problem independently” (David, 2014).

Vygotsky’s theory was centred more on the connections between people and the sociocultural context of their environments (McLeod, 2014). However, his ideology was not without its critiques. One of the major opponents to Vygotsky’s theory of social development was Jean Piaget, who developed his ideas on cognitive development during the same period. Unlike Vygotsky, he believed that with regards to child development, development precedes learning and social factors do not necessarily lead to cognitive development, but rather development comes from self-exploration (David, 2014).

In addition to the psychological perspective of social development, other research attributes the origins of the notion of social development to sociologists and referred to “the process by which societies evolve from a traditional or ‘primitive’ state to a modern, advanced level of civilisation” (Midgley, 2013:5). Another definition from a prominent social work scholar, Paiva (1977:329), defines social development as the “the development of the capacity of the people to work continuously for their own and society’s welfare”.

Further definitions of social development have emerged from various authors and development organisations such as the World Bank and the United Nations Development Programme (UNDP). UNDP uses the term ‘human development’ instead of social development, and as such these two terms may often be used synonymously (Midgley, 2013:10). According to the World Bank (2017), the primary focus of social development is on putting the people first in all the development processes. Social development can be said to have a major influence on human development theory, which is people-centric; this is in contrast to the economic growth theories of development. It is evident that the concepts of social and human development are interrelated and interdependent, “Social development issues can improve and sustain human development” (Millington & Browne, 2015:2).

UNDP (2016a) refers to the human development approach as the enlargement of the quality of human life as opposed to focusing on the economic environment of the human beings.

Emphasis is on individuals' abilities to make rational decisions that improve their wellbeing (Midgley, 2013). Similar to Amartya Sen's "development as freedom", the human development approach is centred on giving people the freedom to make a choice and live the lives they desire and value. Essentially, human development theory moves away from the ideology that economic growth and income growth translates into development; the core of this theory is on improving people's livelihoods (UNDP, 2016a). In addition to the World Bank and UNDP, other international organisations that identify with these two definitions of social development are the United Nations Children's Emergency Fund (UNICEF) and the International Labour Organisation (ILO).

2.2.3 Development from an ecological perspective

Global thinking on development is also currently experiencing a shift from an economic growth focus to an ecological perspective. In the ecological view, development may be referred to as the "capacity of [an ecosystem] to respond positively to change and opportunity" or the "maintenance of [ecosystems'] dynamic capacity to respond adaptively" (Golley, 1990 as cited by OECD, 2005). In contrast to the social and human development approaches, which focus on the interaction between human beings, the ecological viewpoint focuses on "the interactions between human beings and their physical and biological environments; and rather than advocating freedom and competition, it advocates restraint and adaptation" (Dilworth, 1994:452). The ecological perspective also differs from the economic perspective to development. Firstly, the ecological perspectives looks at the system as a whole and how it functions, while the primary focus of the economic perspective is individual human beings and how they can accrue benefits from a process of exchange. Regardless of the differences, the ecological and economic perspectives have one similar feature: they are both concerned with sustainable development, with the economic perspective emphasizing the developmental part and the ecological perspective focusing on the sustainable part (Dilworth, 1994:447).

The World Commission on Environment and Development report states that all humanity is well capable of making development sustainable by ensuring that meeting current needs does not compromise the generations to come (WCED, 1987:8). The notion of sustainable development arose during this period when the World Commission on Environment and Development was established. The concept of sustainable development aims at maintaining economic advancement and progress, while protecting the long-term value of the environment (Emas, 2015:1). The Brundtland Commission report was highly influential as it provided the

strategic underpinning for the 1992 Earth Summit in Rio, the 2002 World Summit on Sustainable Development (WSSD), and various international sectoral policy conferences between 1972 and 2002 (Swilling & Annecke, 2011: 201).

2.2.4 Development as an integrated approach

There are a variety of development theories. Much recent discussions on development focus on an integrated approach to development. This approach to development acknowledges the complex and interrelated challenges in our environment and the need to avoid working in silos, if the challenges are to be addressed (McGlyn, 2015). International organisations such as FHI 360 recognise the need for an integrated approach to development. According to FHI 360, integrated development is defined as “an intentional approach that links the design, delivery, and evaluation of programs across disciplines and sectors to produce an amplified, lasting impact on people’s lives” (Wigley & Petruney, 2015:2). FHI 360 acknowledges that problems are often interrelated and do not exist in isolation, whether the problem or issue has to do with poverty, access to education, or governance – they are interrelated and therefore require a unified approach.

2.3 International commitments to promote integrated development

The international development community came to the realisation that in order to tackle development interventions, there is a need for an integrated approach as there is no single root cause of issues or problems such as poverty (McGlyn, 2015). Reilly (2015) reported a similar understanding and move towards integrated development based on discussions of international development organisations which stated that there is a need to focus on the new model of integrated development which shifts from programmes operating in siloes and promotes interventions (health, education, environment, governance) that must be collective. This has become evident during the completion of the notable MDGs and with the more recent 2030 agenda on achieving SDGs – there is much emphasis on integrating the three dimensions of sustainable development: economic, social and environmental (FHI 360, 2016).

2.3.1 Millennium Development Goals

In the year 2000 world leaders of 189 nations assembled at the UN headquarters and made a commitment to achieve 8 measurable goals by signing the Millennium Declaration (“Millennium Development Goals | MDG Fund”, n.d.). These 8 goals included providing universal primary education, promoting gender equality and reducing child mortality, just to mention a few. The year 2015 was marked as the target for the achievement of the MDGs. As

with any intervention, it is essential to know if these goals achieved their desired or intended effect. The completion term of the MDGs produced a variety of mixed reviews in the development community on the success and failures of these development goals.

In assessing the MDGs, it is essential to note that these global goals made a significant difference in the global policy arena. As an illustration, it is reported that over 21 million lives had been saved and this was depicted in the positive trends of “child mortality, maternal mortality, HIV/AIDS, and tuberculosis” among many other indicators (McArthur & Rasmussen, 2017). Despite this notable improvement in people’s lives, several authors agree that the MDGs displayed unequal progress of results across the globe (Easterly, 2009a; Fehling, Nelson & Venkatapuram, 2013; Fukuda-Parr, Greenstein & Stewart, 2013; Gibbs, 2015; McArthur & Rasmussen, 2017). One major critique of these goals was that the success of the MDGs showed disparities globally – for instance, there was a significant poverty-reduction rate in South East Asia, of which the target was 12.5 percent, but this is in complete contrast to Sub-Saharan Africa, which did not come close to meeting the global goal of poverty reduction (Gibbs, 2015). Figure 2.1 shows how a particular case of sub-Saharan Africa and how it failed to meet each of the goals.

Sub-Saharan Africa

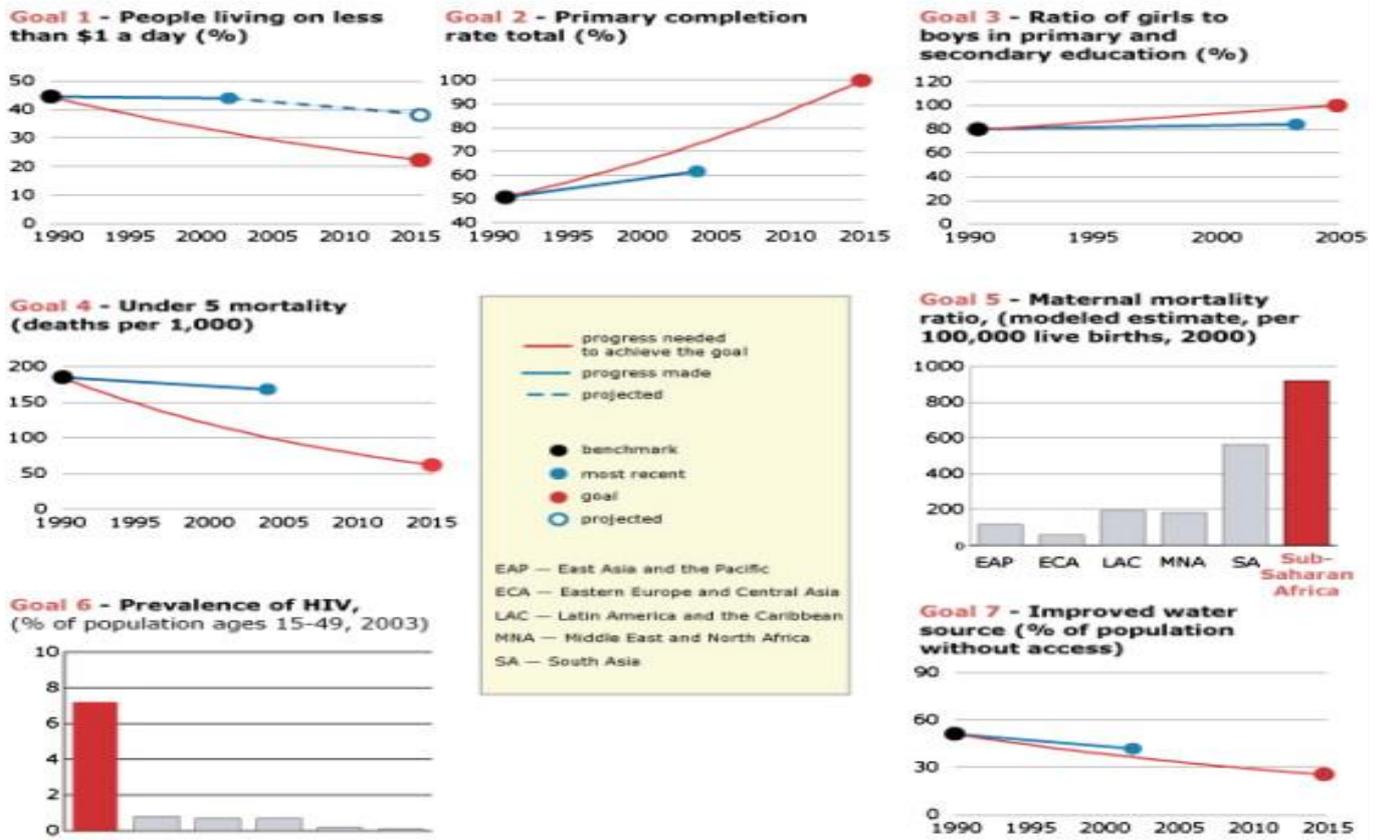


Figure 2.1: World Bank graphic Africa Failure of MDGs

To better summarize each of the 8 goals, Figures 2.2-2.9 presents findings from the World Bank on each individual goal.

Goal 1: Eradicate Extreme Poverty and Hunger

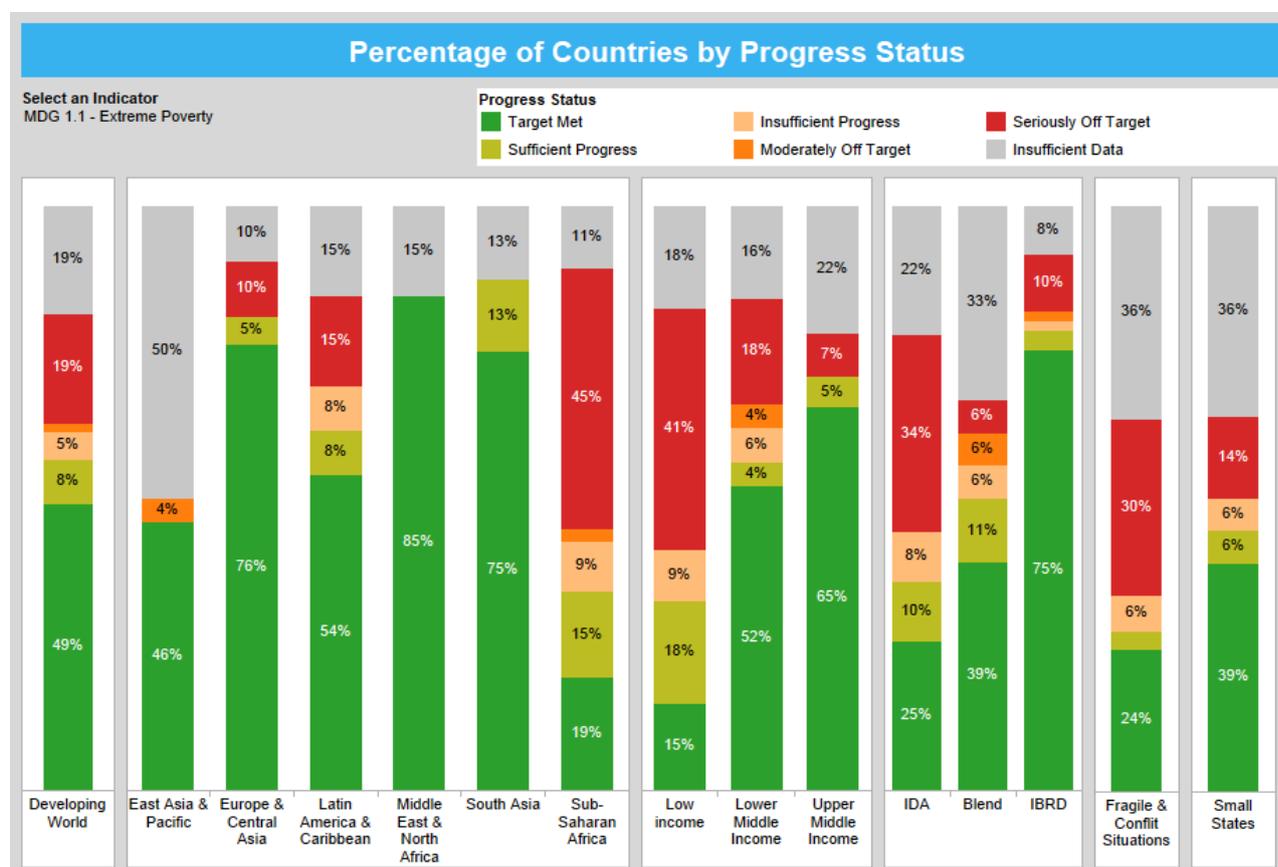


Figure 2.2: MDG 1

As can be seen from **Figure 2.2**, notable progress was achieved in eradicating extreme poverty. According to the Millennium Development Goals report, the world experienced a significant decline in terms of poverty in the developing nations with over half the population previously living in extreme poverty better off (United Nations, 2015c:4). However, there still seems to be unequal distribution as can be seen from the graph in Figure 4, with the nations in Europe and Asia making more progress compared to Sub-Saharan Africa. According to the World Bank report (2015), Africa and Asia are lagging behind and are yet to achieve the poverty milestone. The upper-middle-income countries experienced a significant decline in the poverty rates compared to the low-income countries.

Goal 2: Achieve Universal Primary Education

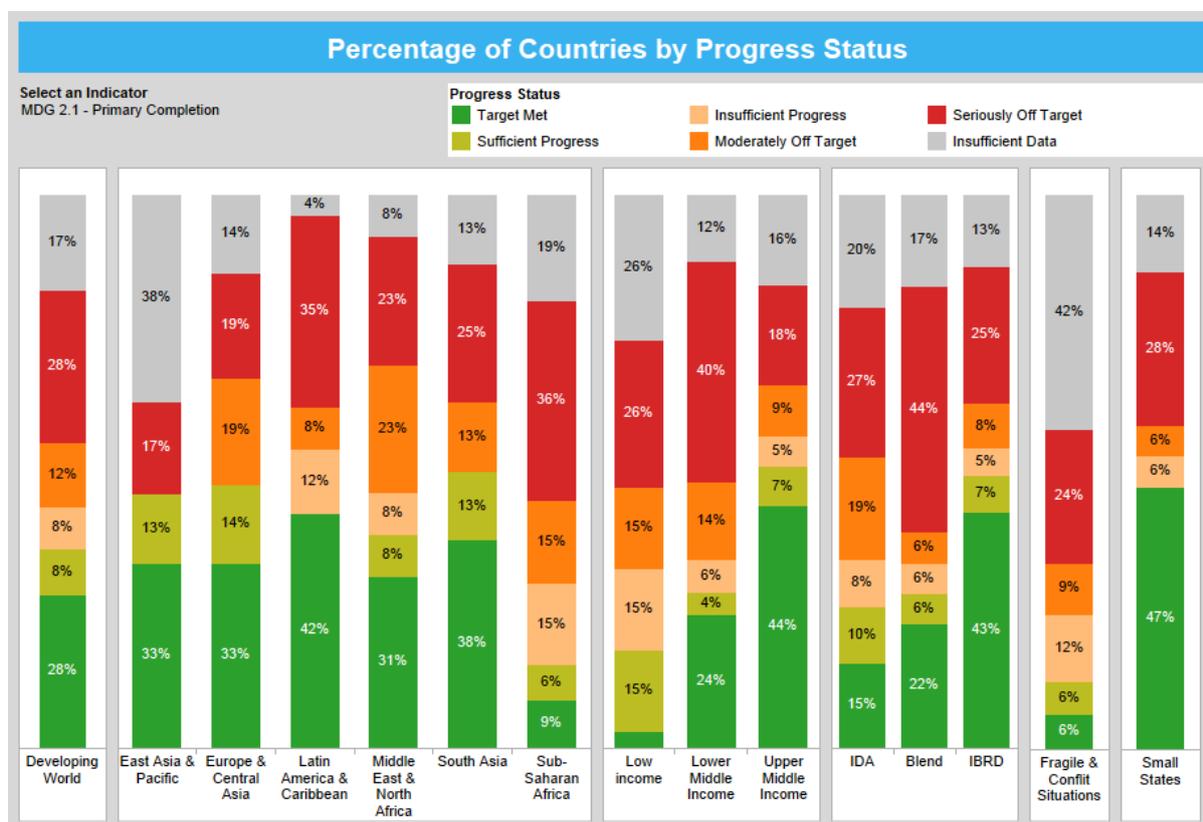


Figure 2.3: MDG 2

Source: World Bank

Significant progress in terms of Goal 2 was achieved worldwide. However, over 55 million children are reported to be out of school and those children in schools are often not acquiring the fundamental skills for work and life (World Bank, 2015). From **Figure 2.3** we can observe that although progress was made, the target was yet to be fully achieved.

Goal 3: Promote Gender Equality and Empower Women

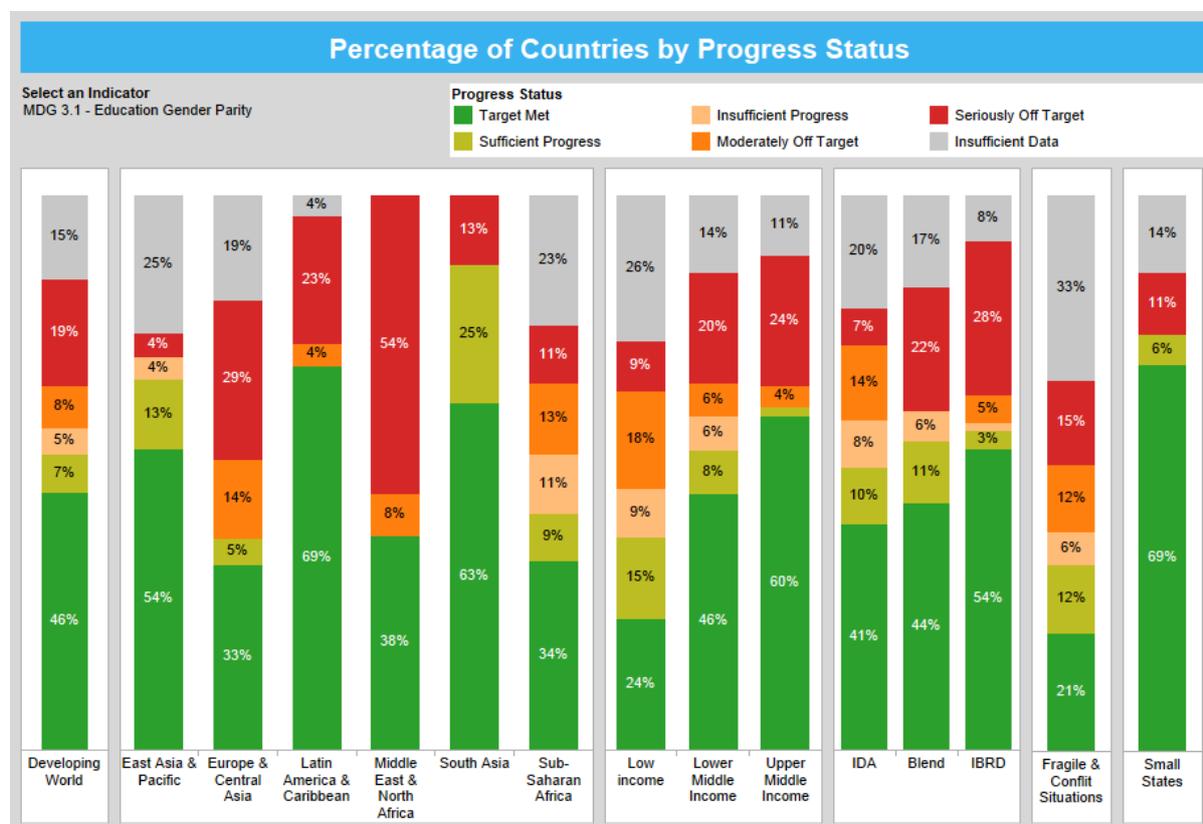


Figure 2.4: MDG 3

Source: World Bank

As far as decreasing gender disparities as one of the global targets is concerned, the MDGs have been critiqued for not fully meeting this target (Fehling *et al.*, 2013:1115). Gibbs (2015) acknowledges this and states that although gender inequality was one of the areas of focus, it is a persistently problematic area internationally and most women and girls continue to face discrimination.

Goal 4: Reduce Child Mortality

“The global under-five mortality rate has declined by more than half, dropping from 90 to 43 deaths per 1,000 live births between 1990 and 2015” (United Nations, 2015c:5). The World Bank report (2015) also concurs with this notion and reports that child deaths had halved in the preceding decades due to improved nutrition, health care and standards of living, to mention just a few. However, the mortality rate for children under 5 is still considered excessively high; this is indicated in Figures 2.5 and 2.6.

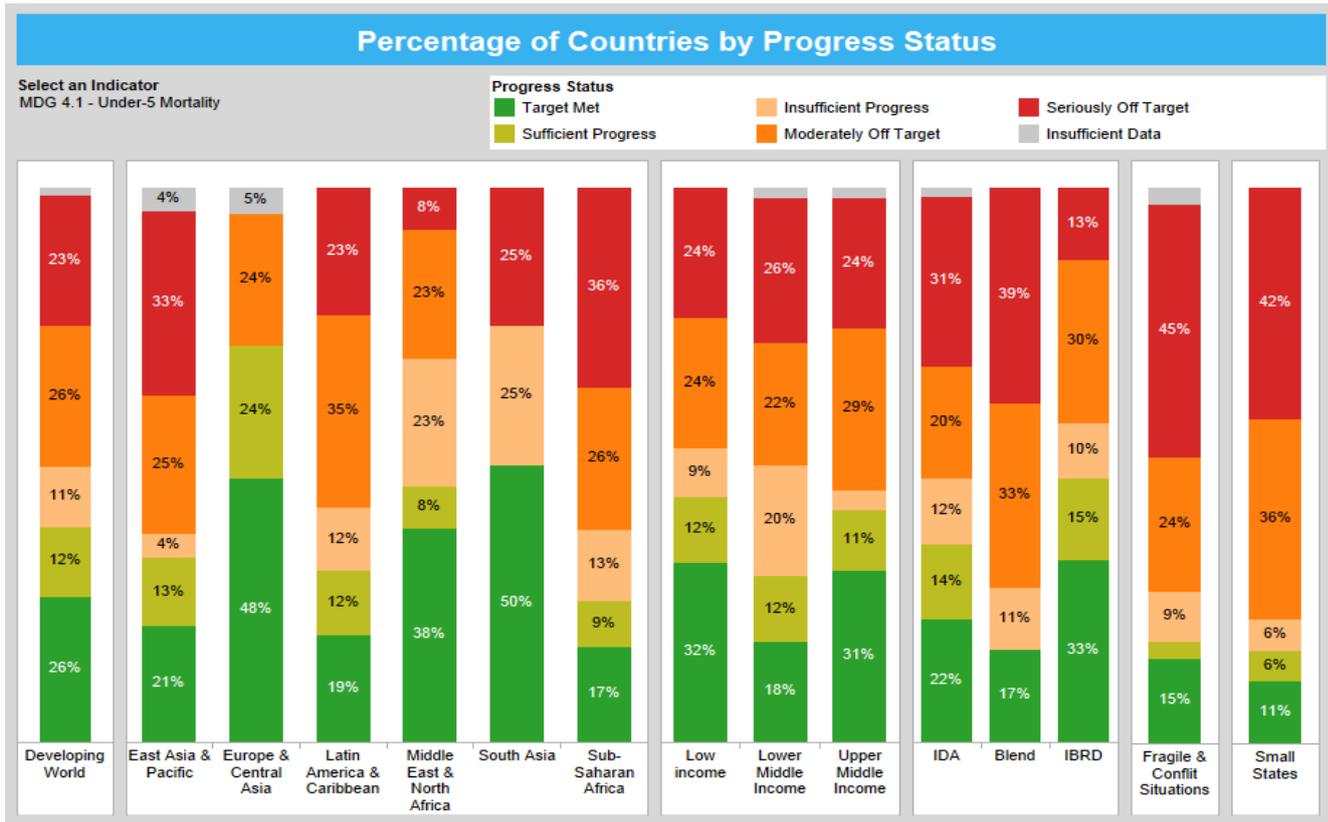


Figure 2.5: MDG 4a

Source: World Bank

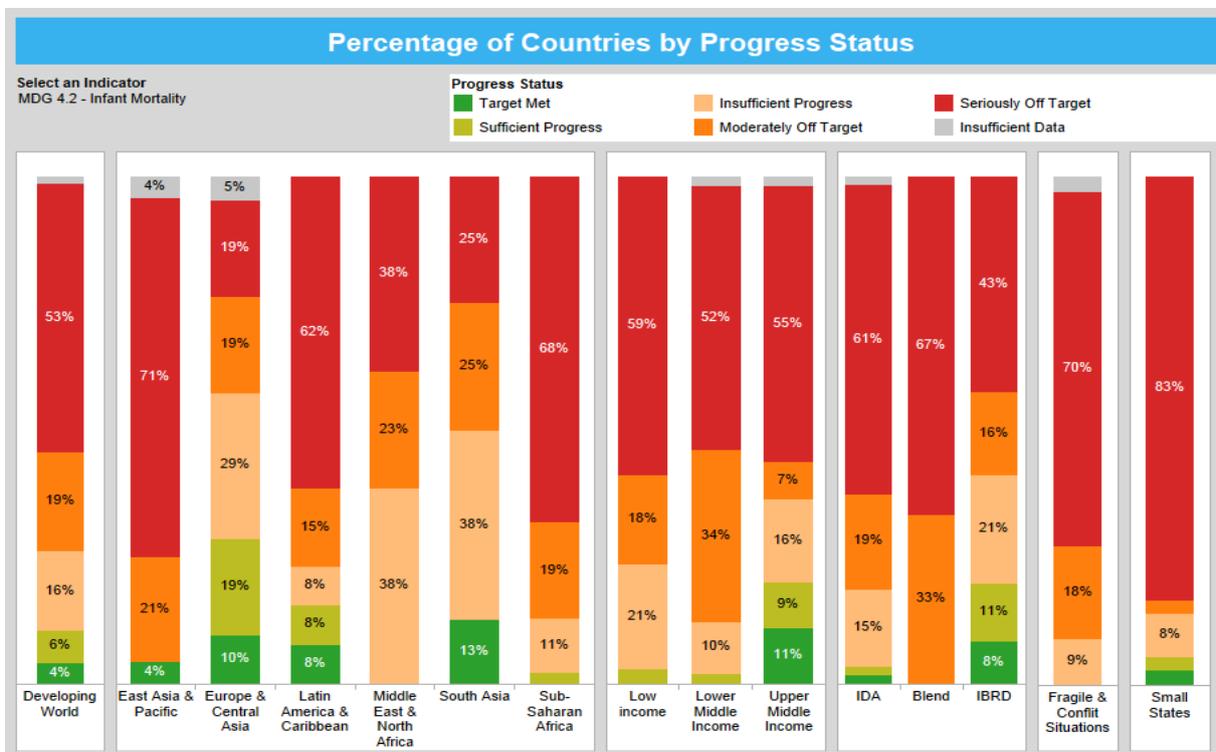


Figure 2.6: MDG 4b

Source: World Bank

Goal 5: Improve Maternal Health

Even though it is reported that maternal mortality declined significantly by 45 percent globally (United Nations, 2015c:6), the target for 2015 was still seriously unachieved. Notable progress was made in South East Asia. Nevertheless, the developing world was 61 percent off target (see **Figure 2.7**).

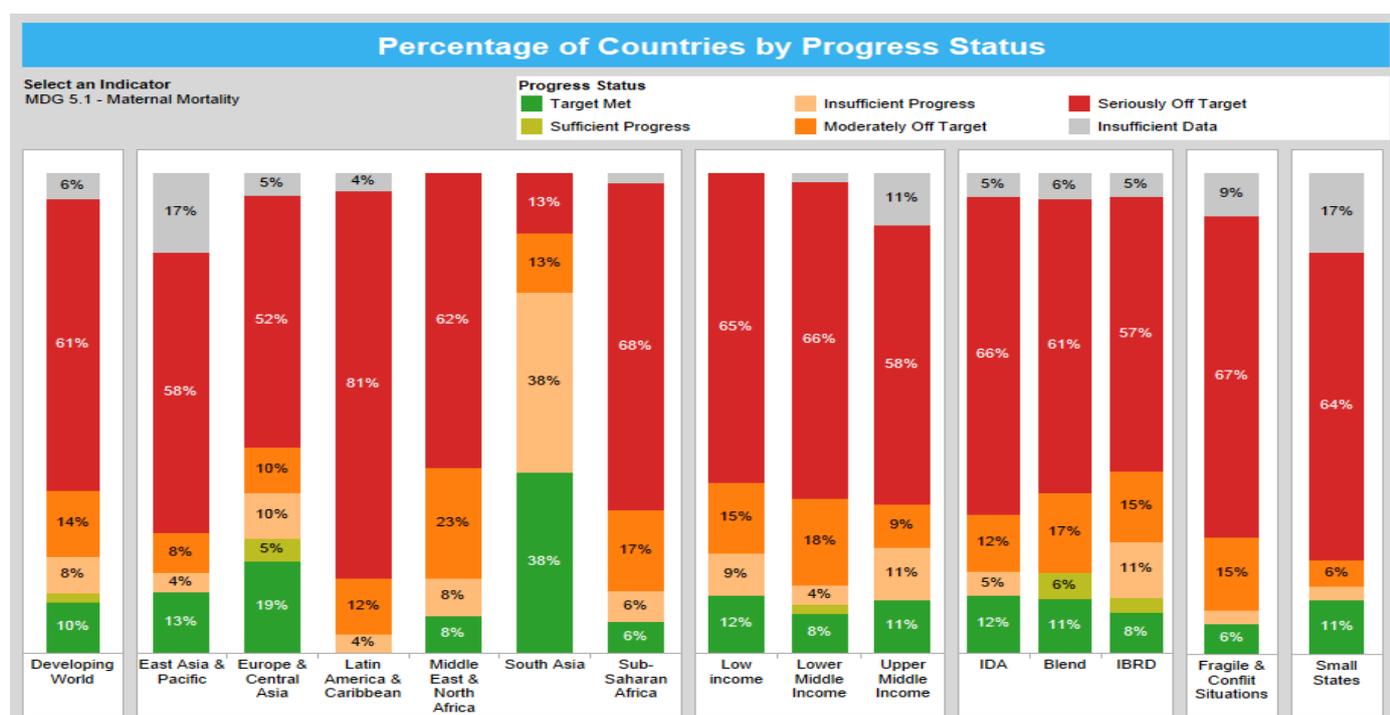


Figure 2.7: MDG 5

Source: World Bank

GOAL 6: Combat HIV/AIDS, Malaria and Other Diseases by 2015

The vast majority of the population (99 percent) that die from diseases such as AIDS, malaria and tuberculosis (TB) are in the developing world (World Bank, 2015). Due to the enforcement of MDG 6, tremendous progress was achieved in terms of the rate at which the infection spread. HIV infections fell by 40 percent in the years 2000 to 2013; this was a significant decline. Similarly, cases of malaria deaths were reported to have declined – “over 6,2 million malaria deaths have been averted between 2000 and 2015” and 37 million lives were saved as a result of tuberculosis prevention and treatments between the same time period of 2000 and 2015 (United Nations, 2015c:6).

Goal 7: Ensure Environmental Sustainability

Environmental sustainability essentially recognises that growth or development must be all-encompassing and not affect the environment negatively so that the needs of future generations can be met (World Bank, 2015). In terms of environmental sustainability the United Nations (2015c:) reported that:

- “Ozone-depleting substances have been virtually eliminated since 1990, and the ozone layer is expected to recover by the middle of this century
- Terrestrial and marine protected areas in many regions have increased substantially since 1990. In Latin America and the Caribbean, coverage of terrestrial protected areas rose from 8.8 percent to 23.4 percent between 1990 and 2014
- In 2015, 91 percent of the global population is using an improved drinking water source, compared to 76 percent in 1990
- Of the 2.6 billion people who have gained access to improved drinking water since 1990, 1.9 billion gained access to piped drinking water on premises. Over half of the global population (58 percent) now enjoys this higher level of service
- Globally, 147 countries have met the drinking water target, 95 countries have met the sanitation target and 77 countries have met both
- Worldwide, 2.1 billion people have gained access to improved sanitation
- The proportion of people practicing open defecation has fallen almost by half since 1990
- The proportion of urban population living in slums in the developing regions fell from approximately 39.4 percent in 2000 to 29.7 percent in 2014”.

Figures 2.8 and 2.9 provide a clear picture on progress of MDG 7 in terms of water and sanitation respectively.

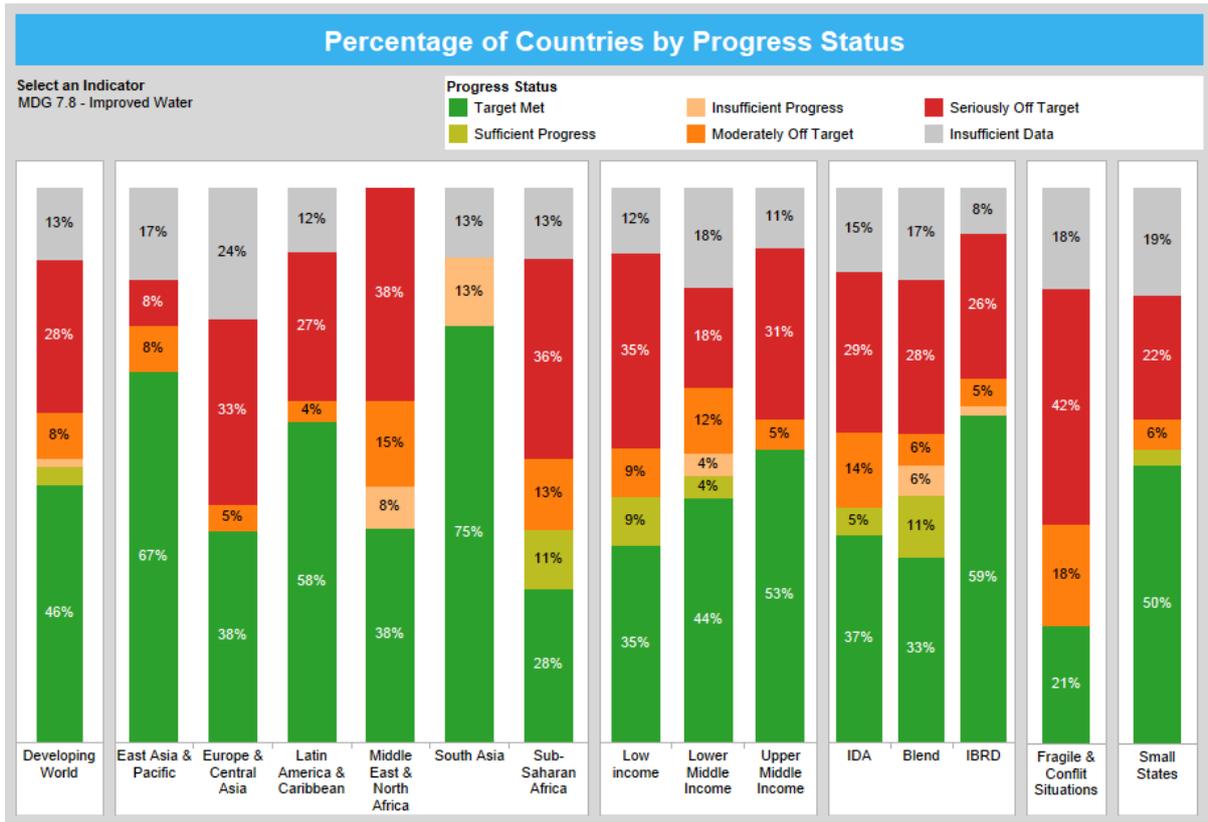


Figure 2.8: MDG 7a

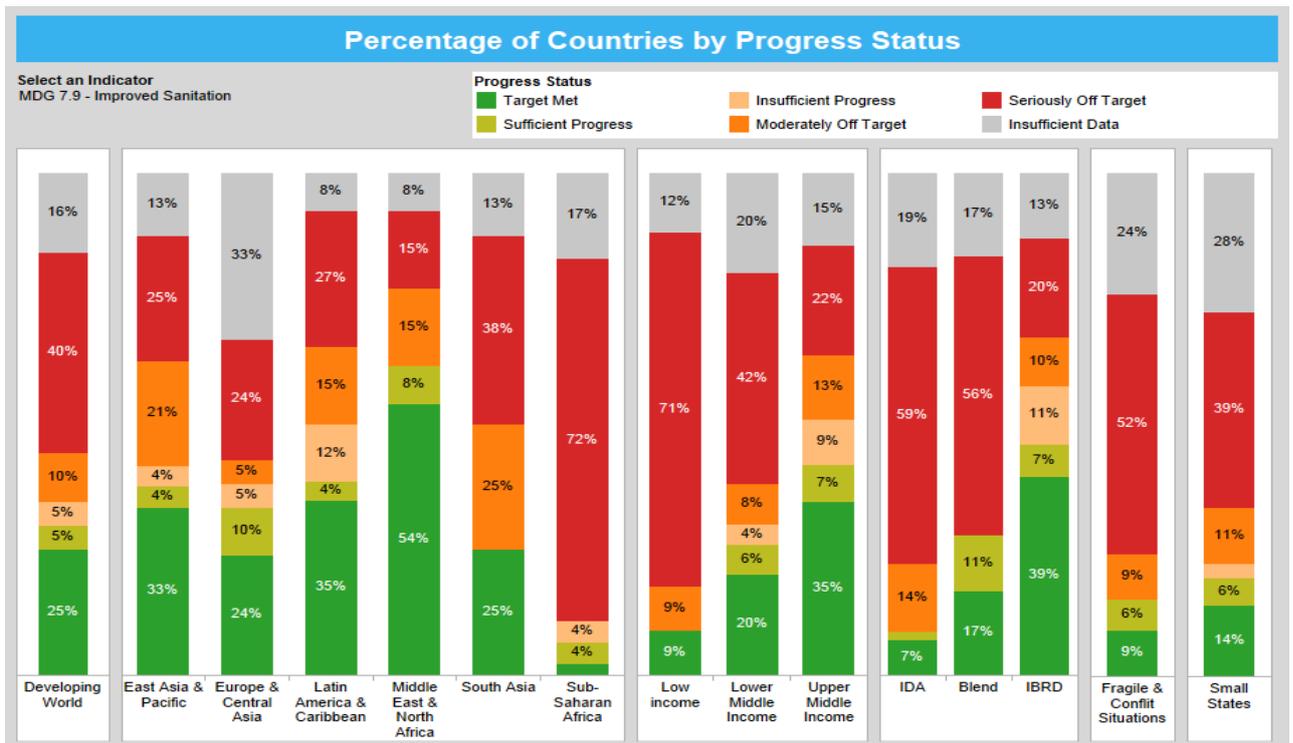


Figure 2.9: MDG 7b; Source: World Bank

Progress in terms of water and sanitation worldwide is not consistent. Regions such as East Asia and the Pacific and South Asia have notably improved on achieving their water target by

far. This is in comparison to other regions such as Sub-Saharan Africa. In terms of improved sanitation, this target has not been sufficiently met, with regions such as Sub-Saharan Africa 72 percent off target.

Goal 8: Develop a Global Partnership for Development by 2015

As Goal 8 suggests, there was a need for development partners to work harmoniously in order for the 8 goals to be achieved by the set target for MDG completion, which was 2015. Various projects were implemented across the globe in order to provide development aid to the developing countries. It was reported that developed nations had increased 66 percent of their assistance amounting to 135.2 billion dollars (United Nations, 2015c:7).

As can be seen from **Figure 2.1**, which shows a snapshot of Africa's failings, and Figures 2.2-2.9, not all target areas were fully met and there have been variations (see **Figure 2.10**) and so to extend the MDGs, the SDGs were formulated.

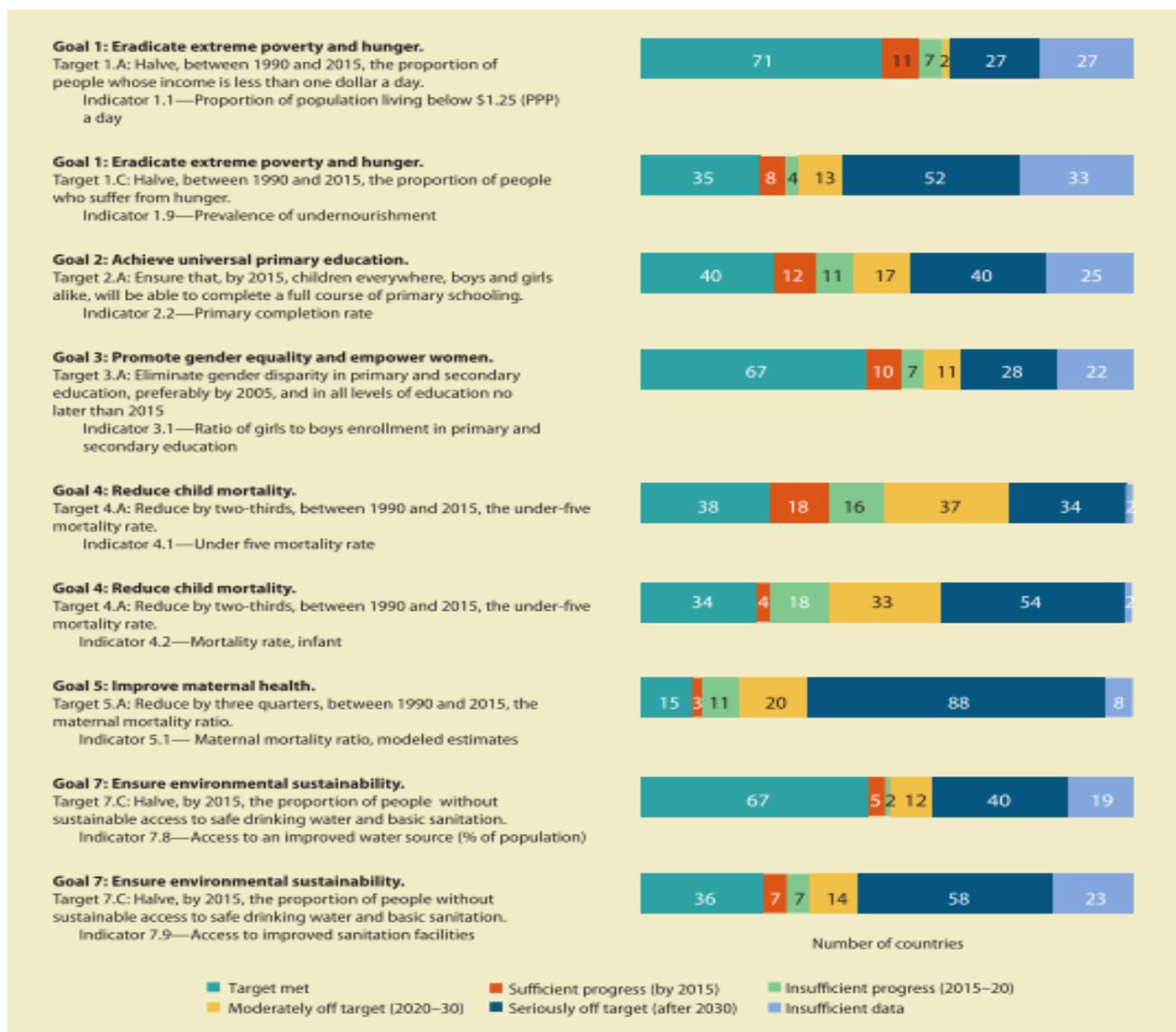


Figure 2.10: MDG Variations

Source: World Development Indicators and Global Monitoring Report team estimates

2.3.2 Sustainable Development Goals

Building on the MDGs, the world transitioned to the SDGs. The global targets of MDGs were for poor countries to a great extent, SDGs, however, target all nations regardless of whether they are rich or poor (Rey & Sachs, 2012:2208). The shift to the SDGs as a global agenda in 2015 “reflects a welcome move into a more comprehensive, multidimensional approach to development” (Tobergte & Curtis, 2013:87). Nations worldwide have made significant improvements in terms of development; however, there are still disparities and there is a need for the continuation of the development agenda.

In 2015 a high-level meeting comprising different heads of state adopted the SDGs (Sustainable Development Solutions Network (SDSN), 2014:2). The high-level summit was

held in Rio de Janeiro, Brazil. This sustainable development summit was popularly known as the Rio+20 summit. The global panel aimed to discuss the sustainable development agenda which has gained growing popularity worldwide (Rey & Sachs, 2012:2206). Essentially the SDGs are a worldwide call to take action aimed at eradicating poverty, protecting the planet and ensuring the human race enjoys peace and prosperity.

They are 17 goals in total and they are built on the success of the MDGs. The SDG framework is founded on a global integrated partnership that puts the emphasis on “universality, accountability and responsibility” (Tobergte & Curtis, 2013:98). Of specific interest in this research is SDG 4, which ultimately focuses on ensuring education opportunities for all that are inclusive, equitable and of high quality (UCLG, 2015:4). The SDG 4 has a number of target areas that expresses a commitment made at an international level by all countries in ensuring that high-quality education is made available to all citizens throughout their lifetime (UNESCO, 2016:8). In addition, SDG 4 ensures that education is made accessible at all levels; pre-primary, primary and secondary. The target areas for SDG 4 are as follows:

“4.1 by 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes

4.2 by 2030 ensure that all girls and boys have access to quality early childhood development, care and pre- primary education so that they are ready for primary education

4.3 by 2030 ensure equal access for all women and men to affordable quality technical, vocational and tertiary education, including university

4.4 by 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship

4.5 by 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples, and children in vulnerable situations

4.6 by 2030, ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy

4.7 by 2030 ensure all learners acquire knowledge and skills needed to promote sustainable development, including among others through education for sustainable development and

sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship, and appreciation of cultural diversity and of culture's contribution to sustainable development

4.a build and upgrade education facilities that are child, disability and gender sensitive and provide safe, non-violent, inclusive and effective learning environments for all.

4.b by 2020, substantially expand globally the number of scholarships available to developing countries, in particular least developed countries, small island developing States and African countries, for enrolment in higher education, including vocational training and information and communications technology, technical, engineering and scientific programmes, in developed countries and other developing countries

4.c: By 2030, substantially increase the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially least developed countries and small island developing States” (UNESCO, 2016:37-47).

In summary, development theories have evolved over time. Evidently, there are diverse conceptions of development and consequently incongruent approaches to the topic. The origin of development theories can be traced back for centuries. Advancements in the development theories/approaches and subjects have influenced various policies and shaped changes in society globally. The evolving development theories have over time influenced newer and modern ways of thinking, such that changes in ideology can be reflected currently in the international environment through the developments of world agendas such as the MDGs and SDGs, which will be discussed in the subsequent sections.

2.4 Education as a means to development

The link between the educational attainment of an individual citizen and the development of a nation or its economic growth has received tremendous attention from policy makers, economists and world leaders. There is a worldwide consensus that education is fundamental to growth and development (King, 2011b). Weaver, Rock and Kusterer (1997:164) concur with this notion and emphasise that education is not only a means to higher economic growth but also a fundamental right for all humans.

Education is vital; this can be observed from an article by Global Partnership for Education, an organisation that is one of the largest funders of basic education in low-income countries. In this article the emphasis on the importance of education is linked to the role that it plays in development. Some of the notable benefits that education provides is the reduction of poverty, an increase in income and boosting national economic growth. As an illustration, it is reported that for every additional year in school, the average annual gross domestic product (GDP) is increased by 0.37%, hence the economic growth of the nation is boosted (Global Partnership for Education, n.d.). The human capital theory reiterates that education is an investment that is worthwhile and indeed a means to the development of a society and the nation at large (Goldin 2014:1).

Similar studies conducted by various authors (Benhabib & Spiegel, 1994; Bils & Klenow, 2000; McMahon, 1998) found that across different countries schooling is positively correlated with the growth rate of GDP per capita. According to a study conducted from the 1960s to the 1990s, enrolment increase in the 1960s consistent with an additional year in school is linked with 30 percent faster annual growth in the 1960-1990's (Bils & Klenow, 2000). To summarise, education appears to be a significant investment that a country can make in its people and its future (Global Partnership for Education, n.d.).

2.4.1 Importance/benefits of education

According to UNICEF (n.d.:1), education has 'high rate of return' and nations can be assured of ending the poverty cycle. One important fact to consider and understand is that primary education has strong bearing on the development of the nation and poverty alleviation (Kadzamira & Rose, 2001:5). An opposing and controversial view has been expressed by Khwaja (2016), who states that: "Education, itself can become a perpetuation of poverty if it is not comprehensively managed and reformed". In other words, education alone cannot eradicate poverty. Khwaja (2016) further argues that previous goals in education such as the MDGs adopted by various countries through country-specific policy plans provided insignificant direction regarding issues of quality in education. In essence, education needs to be looked at comprehensively before drawing at the conclusion that is indeed has a bearing on a nation's economic development or poverty eradication.

While Khwaja (2016) provides sufficient evidence in her article as to why education alone cannot eradicate poverty, Shah, Ghazi, Shahzad and Ullah's (2015:7) arguments are more convincing, since they assert that education does play a significant role in the development of

a nation and quality primary education has been credited widely as the main tool used to strengthen human capabilities in attaining desired goals. Reduction in the school failure rate has benefits for the community, because it contributes to social development and the economic growth of the country (OECD, 2012:9). It is therefore important to understand what constitutes quality education, and more specifically quality primary education, to avoid such failures in the country.

According to a study conducted by the World Bank, every additional year of primary education increases productivity (UNICEF, n.d.:1). However, quality matters in terms of how well these students are being taught and also how much they learn; this is because these factors have a vital impact on the length of time they can stay in school and also their attendance rate (UNESCO, 2005:28). Like any other English term, there are various definitions of ‘quality education’. According to a report by UNICEF (2000:4), quality in education includes:

- *“Learners who are healthy, well-nourished and ready to participate and learn, and supported in learning by their families and communities;*
- *Environments that are healthy, safe, protective and gender-sensitive, and provide adequate resources and facilities;*
- *Content that is reflected in relevant curricula and materials for the acquisition of basic skills, especially in the areas of literacy, numeracy and skills for life, and knowledge in such areas as gender, health, nutrition, HIV/AIDS prevention and peace;*
- *Processes through which trained teachers use child-centred teaching approaches in well-managed classrooms and schools and skilful assessment to facilitate learning and reduce disparities;*
- *Outcomes that encompass knowledge, skills and attitudes, and are linked to national goals for education and positive participation in society”*

From the comprehensive definition above, the effectiveness and anticipated policy outcomes of primary education in Malawi can only be achieved if indeed quality in education is set as a priority area. Even though education is anticipated to lead to a country’s long-term economic growth, governments may at times lack adequate resources to ensure that the schools are provided with the necessary resources of acceptable quality required to achieve the set goals

(Kadzamira & Rose, 2001:5). It seems that such gaps may hinder the achievement of policy objectives outlined by the government.

In the significant model discussed above on quality of education as derived by UNICEF (2000), quality comprises five dimensions, i.e. quality learners, quality learning environments, quality content, quality processes and quality outcomes. By extension, according to UNESCO (2004:29), quality inputs include availability of teaching and learning materials, the appropriate learning environment, classroom and furniture, the curriculum, and qualified teachers.

2.4.2 Quality of Primary Education in Malawi- Perspective on UPE policy implementation results

Regarding quality in education, it is essential that we look at a brief overview of the quality of primary education in Malawi. Various studies on quality of education since introduction of FPE policy have been undertaken (Avenstrup, Liang & Nellesmann, 2004; Chimombo, 2005; Kadzamira & Rose, 2001; Nishimura, Ogawa, Sifuna, Chimombo, Kunje, Ampiah, Byamugisha, Sawamura & Yamada, 2009; Rose, 2003b,a). ‘The Education for All’ conference held in Jomtien, Thailand was a move towards international policy implementation and portrayed a consensus among various nations on making primary education free. Malawi was among the countries part of this treaty which was perceived to be beneficial for the countries in reducing poverty and developing the nations by means of providing students with literacy and numeracy skills, life skills and foundational skills for higher learning just to mention a few (Avenstrup *et al.*, 2004:5). Making primary education free aroused much interest in the political and academic arena which made scholars to question the quality of the education provided and the learning outcomes thereafter.

According to Chimombo (2005:157) a number of challenges were encountered in implementing the policy of EFA in Malawi. The policy on fee abolition at primary education brought with it unintended consequences such as issues of the quality in education (Avenstrup *et al.*, 2004:5). Among the areas of concern was the lack of adequate material provision in schools and it was discovered that they were low levels of pupil achievement (Nishimura *et al.*, 2009:144). Primary level of education was the focus of the government as it believed that the goal of poverty alleviation could be achieved, however resource constraints hindered effective implementation of this goal. In a cross comparison study of UPE in four countries, namely, Malawi, Ghana, Kenya and Uganda it was discovered that common issues included administrative and financial constraints at the school levels (Nishimura *et al.*, 2009:156).

Administrative constraints influence the students performance at the schools due to lack monitoring and evaluation and management of the school committees (Nishimura *et al.*, 2009:150). For instance, it was discovered that there was a shortage of qualified teachers in Malawi (Chimombo, 2005; Kadzamira & Rose, 2001; Nishimura *et al.*, 2009). Such shortage of qualified teachers has a negative impact as the students may not be receiving the help they need to achieve the required learning outcomes. Administrative constraints are also linked to the finance constraints. Insufficient finances may limit the administrative capacity that can be employed, learning materials in schools and the performance of the students at school. According to Nishimura *et al.* (2009:154), a large proportion of the budget on education was allocated to transfer of teachers, teacher deaths and grants for the teachers and little amount for the teaching and learning materials.

The goal of making primary education free was essentially good. However, the schools in Malawi not only suffered from inadequate funds and resources but also the general quality of education in schools is known to have declined (Nishimura *et al.*, 2009:3). Rose, (2003a:78) also acknowledges the challenges faced in Malawi “as a result of the Education for All agenda” which led to the rapid expansion in the 1990s leading to compromise on quality in the primary education schooling.

2.4.3 International perspective on education policies’ results

Globally, different countries hold diverse perspectives on education policies based on the value that they place on the significance of education. The Asia Society (2010:2) recognises that in the global and innovation-based world that we live in, education is essential to growth in the economy. To take an example, internationally six top-ranked countries (Singapore, Finland, England, China, Australia and Canada) in terms of educational achievement are evidently experiencing economic growth due to the high regard in which they hold to education reform (Asia Society, 2010:3). However, Kenny (2014) argues that investing in education does not lead automatically to economic growth for a number of reasons. His view is contrary to the human capital theory, which suggests that even though policies resulting in public education expenditure are mainly justified on the basis of the spill-over effects of the benefits not only to the individual pupil, but the whole society as the child attends school. Statistics in a study conducted by Lawrence Katz and Claudia Goldin reveal that educational attainment among Americans from 1915 to 1999 might only account for a minor 10 percent of the economic growth in America (Kenny, 2014). Despite the contrary view, studies reveal that the six

countries mentioned above have indeed made tremendous progress due to the adoption of relevant policies in education and their implementation in specific countries (Asia Society, 2010:3).

By extension, a recent study conducted in China aimed at evaluating the policy on the universal provision of primary education sought pertinent solutions to questions such as: Who benefits from such a policy? (Ou, 2016:511). Given the view of the human capital theory, differences of opinion on who benefits have arisen as to whether it is only the individual or the whole of society (Goldin, 2014; Rose, 2003a; Sweetland, 1996). The study clarified such discrepancies by providing evidence. The study in China begins by discussing how economists use the compulsory education policy due to the fact that education has its various outcomes or benefits. The study found that the individual and society benefited from the compulsory primary education policy (Ou, 2016:529). In measuring a country's benefits from investing in education, other developed nations such as the United States of America (USA) also acknowledge the importance of having appropriate policies and programmes that aim at investing in the education of children and the youth as a way of ensuring growth in the economy (Hanushek, 1996:9).

The relationship between education and development has been investigated by many researchers (Weaver *et al.*, 1997). According to a study conducted by Weaver *et al.* (1997:165) on education and development in East Asia, a country-specific study revealed tremendous progress in education made by Taiwan over the years due to the country's investment in policy. It was reported that due to this investment, literacy increased from 1 percent in 1905 to 27 percent by 1940. In addition, the primary enrolment rate also increased over time; the enrolment rate in primary schools was 71 percent in 1944. Following continual investment in education and the policy on free primary education, by 1970 Taiwan had already achieved universal primary education (Weaver *et al.*, 1997:165). Countries in East Asia such as South Korea, Japan, Singapore, India, Russia and China are found to have greater educational development potential as a result of their high level of educational efficiency (Liu & Xu, 2017:10). On the basis of such findings, East Asian countries have great potential regarding the future development of the respective country.

Weaver *et al.* (1997:165-168) point out that, in contrast, African countries show poor educational performance or results over time. Following the independence of African states, education systems expanded between 1960 to 1983. Expansion of the education system implied

an increase in enrolment rates. The population of African countries continued to expand, which implied that governments needed to be able to sustain the increase in enrolment rates. However, between 1980 and 1990 there was an economic crisis which led to the decline of public expenditure. The education systems were affected negatively as the quality of education being offered was very poor. For instance, teachers often taught without the necessary resources, hence the weak education results in the region. In view of this, African nations should consider a review and evaluation of policies in order for them to be effective in the long run.

2.5 Means to measure educational success

In order to effectively evaluate the effectiveness of the Malawi primary education policy, it is necessary to understand how to measure educational success. Internationally, numerous indicators have been devised on measuring education success. UNESCO has set and defined globally comparable indicators on education. Indicators may be defined as a measurement tool for tracking progress and assessing whether objectives have been achieved (Cloete, Rabie & Coning, 2014a:279). **Table 2.1** shows an extract of a set of definitions of indicators for measuring educational success that are deemed relevant for the purposes of this study:

Table 2.1: Extract of UNESCO Definitions on Education Indicators

UNESCO EDUCATION DEFINITIONS
ILLITERACY RATE: The percentage of population aged 15 years and over who can both read and write with understanding a short simple statement on his/her everyday life. Generally, 'literacy' also encompasses 'numeracy', the ability to make simple arithmetic calculations. Adult illiteracy is defined as the percentage of the population aged 15 years and over who cannot both read and write with understanding a short simple statement on his/her everyday life
GROSS INTAKE RATIO (GIR) IN THE FIRST GRADE OF PRIMARY: Total number of new entrants in the first grade of primary education, regardless of age, expressed as a percentage of the population at the official primary school-entrance age.
NET INTAKE RATE (NIR) IN THE FIRST GRADE OF PRIMARY: New entrants in the first grade of primary education who are of the official primary school-entrance age, expressed as a percentage of the population of the same age.
TRANSITION RATE (TR): The number of pupils (or students) admitted to the first grade of a higher level of education in a given year, expressed as a percentage of the number of pupils (or students) enrolled in the final grade of the lower level of education in the previous year.
GROSS ENROLMENT RATIO (GER): Total enrolment in a specific level of education, regardless of age, expressed as a percentage of the eligible official school-age population corresponding to the same level of education in a given school year.
NET ENROLMENT RATE (NER): Enrolment of the official age group for a given level of education expressed as a percentage of the corresponding population.
REPETITION RATE BY GRADE (RR): Proportion of pupils from a cohort enrolled in a given grade at a given school year who study in the same grade in the following school year.
SURVIVAL RATE BY GRADE (SR): Percentage of a cohort of pupils (or students) enrolled in the first grade of a given level or cycle of education in a given school year who are expected to reach successive grades.
COEFFICIENT OF EFFICIENCY: The ideal (optimal) number of pupil-years required (i.e. in the absence of repetition and dropout) to produce a number of graduates from a given school-cohort for a cycle or level of education expressed as a percentage of the actual number of pupil-years spent to produce the same number of graduates. Input-output ratio, which is the reciprocal of the coefficient of efficiency, is often used as an alternative. N.B. One school year spent in a grade by a pupil is counted as one pupil-year.
PERCENTAGE OF REPEATERS: Total number of pupils who are enrolled in the same grade as in a previous year, expressed as a percentage of the total enrolment to the specified grade.
PERCENTAGE DISTRIBUTION OF PUBLIC CURRENT EXPENDITURE ON EDUCATION BY LEVEL: Public current expenditure for each level of education, expressed as a percentage of total public current expenditure on education.
PUPIL-TEACHER RATIO (PTR): Average number of pupils (students) per teacher at a specific level of education in a given school year.
PERCENTAGE OF FEMALE TEACHERS: The number of female teachers at a given level of education expressed as a percentage of the total number of teachers (male and female) at the same level in a given school year.
GROSS PRIMARY GRADUATION RATIO (GPGR): Total number of graduates from the last grade of primary education, regardless of age, expressed as a percentage of the population at the theoretical graduation age for primary.
EXPECTED GROSS PRIMARY GRADUATION RATIO (EGPGR): Total number of new entrants to the first grade of primary in a given year, regardless of age, who are expected to graduate from the last grade of primary education, regardless of repetition, expressed as a percentage of the population at the official graduation age from primary education in the same year
OUT-OF-SCHOOL CHILDREN-PRIMARY (OOS): Children in the official primary school age range who are not enrolled in either primary or secondary schools.
PROMOTION RATE BY GRADE (PR): Proportion of pupils from a cohort enrolled in a given grade at a given school year who study in the next grade in the following school year
DROPOUT RATE BY GRADE (DR): Proportion of pupils from a cohort enrolled in a given grade at a given school year who are no longer enrolled in the following school year.
PERCENTAGE OF TRAINED TEACHERS: Number of teachers who have received the minimum organized teacher training (pre-service or inservice) required for teaching at the specified level of education in the given country, expressed as a percentage of the total number of teachers at the same level of education

Source: UNESCO Education Indicators Technical guidelines 2009

2.5.1 Outline of SDG 4

As an extension of the indicators in Table 2.1, the Education 2030 Framework for Action (2016:65) recognises the UNESCO Institute of Statistics (UIS) as “the official source of cross-nationally comparable data on education”. As such UIS worked in coordination with the 2030 steering committee in coming up with more recent targets and indicators for the SDGs.

Globally, the targets underpinned in the SDG 4 expresses all countries’ commitment to ensure that the citizens have a right to access quality education in all phases such as pre-primary, primary and secondary level (United Nations, 2015:15). The governments of the various countries therefore have a fundamental role to ensure that access to quality education is indeed a right of the citizen regardless of race, socioeconomic background or ethnicity (Niño-Zarazúa, 2016:3). SDG 4 has a number of global targets which can be quoted to reflect the unfinished agenda on education for all; the targets and indicators are summarised in Table 2.2.

Table 1.2: SDG4 National Indicators

Complementary National Indicators for Goal 4:
4.1. [Percentage of girls and boys who acquire skills and values needed for global citizenship and sustainable development (national benchmarks to be developed) by the end of lower secondary] – to be developed. This indicator measures the percentage of children who acquire skills and values needed for them to be productive “global citizens,” recognizing that beyond basic academic work, there are values and skills that enable children to grow up to become socially responsible, emotionally mature, and productive members of society.
4.2. Percentage of children under 5 experiencing responsive, stimulating parenting in safe environments. The MICS indicator measures the percentage of children below 5 years with whom an adult has engaged in four or more activities to promote learning and school readiness in the past 3 days. ¹³⁷
4.3. Number of children out of school. This UNESCO indicator measures the number of school-aged children out of school. Particular attention should be paid to children in conflict- or disaster-affected countries.
4.4. [Percentage of adolescents (15-19 years) with access to school-to-work programs] – to be developed. This indicator measures the percentage of adolescents who are offered programs that enable them to transition from school to employability and work, either through vocational or apprenticeship training programs. It is marked as “to be developed” as there is no global definition yet of what constitutes a school-to-work program.
4.5. Literacy rate of 15-24 year-olds, women and men (MDG Indicator). This MDG Indicator measures the proportion of young adult women and men that are literate as a proportion of the total population within that age group.
4.6. [Percentage of young adults (18-24 years) with access to a learning program] – to be developed. This indicator measures the percentage of young adult women and men that can enroll and learn a new skill or course to improve their knowledge, skills, and competencies.
4.7. [Indicator on share of education facilities that provide an effective learning environment] – to be developed. This indicator measures the quality and adequate resourcing of educational facilities.
4.8. Pupil to computer ratio in primary and secondary education. This UNESCO indicator measures access to digital technology in schools.
4.9. [Indicator on scholarships for students from developing countries] – to be developed.
4.10. [Indicator on supply of qualified teachers] – to be developed. This indicator will track the supply of qualified teachers.
4.11. Presence of legal frameworks that guarantee the right to education for all children for early childhood and basic education, and that guarantee a minimum age of entry to employment not below the years of basic education. This indicator tracks the legal guarantee of the right to education.

Source: Sustainable Development Solutions Network (SDSN), 2014:143-144

The SDGs are among other pledges that Malawi has committed itself to in its Growth and Development Strategies. Particular emphasis is stated to be on education as this is what is perceived to assist the nation attain accelerated growth in the economy and further realization of SDGs (Malawi, 2017:XViii). As regards the current study, further attention is placed on SDG 4, its target areas and indicators which will form the basis of evaluating the primary education policy.

In essence, the success of education can no longer be measured by national-level standards in the global economy, but by international education systems standards of measurement. For the purposes of our study, attention will be on the internationally recognised SDG 4 which has primary education as one of the main components. In measuring the success of education, 7 indicators (Indicators 31-37) have been developed as a monitoring framework by the Sustainable Development Solutions Network (SDSN), (2014). In the current study the focus will be narrowed down further to Indicators 33 and 34, which are in line with the second research objective of the study.

Indicator 33 primarily focuses on measuring the rate of completion for girls and boys at the primary level of education. According to the International Standard Classification of Education ISCED (2011:30), primary education is to provide pupils with skills that are essential, such as literacy and numeracy skills (mathematics, writing and reading). In addition, primary education is also aimed at establishing a strong foundation for the students' learning and understanding of various core areas as a prerequisite for moving on to lower secondary education. The SSDN has thereby adopted measurement criteria for the completion of primary education established by the ISCED. The completion rate for primary education is measured by the Gross Intake Ratio, which essentially translates to the total sum of new entrants who have managed to reach the final grade of education in primary school (Sustainable Development Solutions Network (SDSN), 2014:139). A high Gross Intake Ratio to last grade signifies a high degree of primary education completion.

Indicator 34 measures the 'Percentage of girls and boys who master a broad range of foundational skills, including in literacy and mathematics, by the end of the primary school cycle (based on credibly established national benchmarks)'. This indicator aims to measure the proportion of children's proficiency in terms of reading skills and ability to comprehend text in their primary language of instruction relative to the total number of pupils at the end of the primary education school cycle in their nation (Sustainable Development Solutions Network (SDSN), 2014:140).

2.5.2 Proposed education indicators by other development organisations

In addition to UNESCO, other international organisations have over time proposed varying sets of criteria to measure education level and its success. As an illustration the Organisation for Economic Co-operation and Development (OECD) also has a set of indicators for measuring success in the education system. See Table 2.3 below

Table 2.3: Indicators of Education Systems

OECD Indicators of Education Systems
<p><i>The output of educational institutions and the impact of learning</i></p> <p>Key questions:</p> <p>How many students finish secondary and tertiary education?</p> <p>How does educational attainment affect participation in the labour market?</p> <p>What are the social outcomes of education? What are the earnings premiums from education?</p>
<p><i>The financial and human resources invested in education</i></p> <p>Key Questions:</p> <p>How much public and private investment in education is there?</p> <p>How much do tertiary students pay, and what public subsidies do they receive?</p> <p>On what resources and services is education funding spent?</p>
<p><i>Access to education, participation and progression</i></p> <p>Key questions:</p> <p>Who participates in education?</p> <p>How many students will enter tertiary education?</p> <p>Who studies abroad, and where?</p> <p>How have 15-29 year-olds transitioned from school to work?</p>
<p><i>The learning environment and organisation of schools</i></p> <p>Key questions:</p> <p>How much time do students spend in the classroom?</p> <p>What is the student-teacher ratio, and how big are classes?</p> <p>How much are teachers paid?</p>

Source: *OECD, 2012b:6*

By extension, the World Bank has numerous indicators on each level of education, from early childhood education to tertiary level. For the purposes of this study's focus, which is primary education policy in Malawi, some of the pertinent indicators include but are not limited to the following:

- Enrolment rate with reference to gender
- Intake rate at Grade 1
- Numeracy skills at each grade
- Percentage of schools with basic access to electricity and sanitation facilities
- Dropout rate
- Graduation rate from primary school education

- Net intake rate
- Out of school children
- Over-age enrolment ratio
- Percentage of those repeating
- Primary completion rate with regards to gender (World Bank, 2018a).

In addition to UNESCO, OECD and the World Bank indicators, UNICEF – a “humanitarian and developmental assistance to children and mothers in developing countries” – also has a defined indicator with regard to measuring education success. The indicators are based on the ISCED which stem from UNESCO (ISCED, 2011:6). Table 2.4 below reveals defined indicators for measuring education as per UNICEF criteria.

Table 2.4: Defined Indicators - UNICEF

UNICEF Indicators Defined
Gender parity index – The ratio of female-to-male values of a given indicator. A GPI of 1 indicates parity between the sexes.
Literacy rate – Total number of literate persons in a given age group, expressed as a percentage of the total population in that age group. The adult literacy rate measures literacy among persons aged 15 years and older, and the youth literacy rate measures literacy among persons aged 15 to 24 years.
Out-of-school population – Total number of primary or lower secondary-school-age children who are not enrolled in primary (ISCED 1) or secondary (ISCED 2 and 3) education.
Pre-primary school gross enrolment ratio – Number of children enrolled in pre-primary school, regardless of age, expressed as a percentage of the total number of children of official pre-primary school age.
Primary school gross enrolment ratio – Number of children enrolled in primary school, regardless of age, expressed as a percentage of the total number of children of official primary school age.
Primary school net attendance ratio – Number of children attending primary or secondary school who are of official primary school age, expressed as a percentage of the total number of children of official primary school age. Because of the inclusion of primary-school-age children attending secondary school, this indicator can also be referred to as a primary adjusted net attendance ratio.
Primary school net enrolment ratio – Number of children enrolled in primary or secondary school who are of official primary school age, expressed as a percentage of the total number of children of official primary school age. Because of the inclusion of primary-school-age children enrolled in secondary school, this indicator can also be referred to as a primary adjusted net enrolment ratio.
Secondary school net attendance ratio – Number of children attending secondary or tertiary school who are of official secondary school age, expressed as a percentage of the total number of children of official secondary school age. Because of the inclusion of secondary-school-age children attending tertiary school, this indicator can also be referred to as a secondary adjusted net attendance ratio.
Secondary school net enrolment ratio – Number of children enrolled in secondary school who are of official secondary school age, expressed as a percentage of the total number of children of official secondary school age. Secondary net enrolment ratio does not include secondary-school-age children enrolled in tertiary education, owing to challenges in age reporting and recording at that level.
Survival rate to last primary grade – Percentage of children entering the first grade of primary school who eventually reach the last grade of primary school.

Source: <https://data.unicef.org/topic/education/overview/>

Evidently, the education indicators are similar across the international organisation communities. As such, it can be inferred that globally the notion of advancing education and education-related policies is of prime significance.

2.5.3 Generic criteria for measuring quality of education

In order for countries to achieve effectiveness of their policies in the long run, improvements that are fostered in the education system should ensure that every student has access to quality education from the early phases of education system to the later and more advanced levels – secondary, tertiary etc. (Michelsen & Wells, 2017:9).

2.5.3.1 *Access to teaching and learning materials*

In further discussions on measuring education quality, access to teaching and learning materials has become an important aspect. Access to teaching and learning materials is seen as one of the prerequisites to attain successful learning outcomes (Nielsen & World Bank. Independent Evaluation Group., 2006:19). For example, this may include supplies of teaching material, book-pupil ratio, student-teacher ratio, availability of libraries and ICT equipment, to mention just a few. Other factors to take into consideration when measuring access to teaching and learning materials may include but not be limited to the following:

- Pupil/text book ratio
- Basic teacher knowledge, i.e. mathematical skills
- Teacher effort which can be measured by their availability in school or average time spent on set tasks and activities per day
- Teacher absenteeism
- Teacher incentives (Ravishankar, El-Kogali, Sankar, Tanaka & Rakoto-Tiana, 2016: 39-43).

This is clearly revealed across the education indicators for measuring education success across the international organisations and alliances such as the World Bank, UNESCO, UNICEF and OECD.

2.5.3.2 *Leadership and governance*

According to UNICEF (2000:17), quality of the leaders and support of administration is a crucial component in any school processes for both parties, the teachers and the students. It should also be noted that issues of governance, accountability and administrative capacity in education systems have been widely discussed in the donor community (Niño-Zarazúa, 2016:6). In a study conducted a few years ago in Sub-Saharan Africa on the policy of free primary education, it was reported from the five countries that their respective governments

are highly dependent on external donor funding (Riddell & Abby, 2004:14). Malawi is no exception and was one of the subjects in the study.

In terms of governance and administrative issues, the introduction of the policy, even though it had some benefits, posed a challenge to the current weak system which did not take into account the inadequate resources to meet the demands of the students enrolled (Riddell & Abby, 2004:3). Kadzamira and Rose (2001) argue that the lack of a proper policy framework and analysis is what led to resource implications, as the leaders did not take time to scrutinize and come up with a proper plan in implementing the policy. According to the government of Malawi (NEP, 2013:5), two decades have passed since the introduction of free primary education, yet it has not yet overcome the challenges. It seems that because of the oversight by the government and policy makers at the time, challenges arising from the implementation of the policy could have been avoided ultimately leading to an effective policy implementation. In addition, despite the newly introduced SDGs and support from various donor funding agencies, progress can evidently be made if institutional capacities and issues of leadership and governance are dealt with internally.

2.6 Chapter summary

Like all theories, development theories evolve over time. Development theories can be described from an economic growth viewpoint to a more integrated approach. Development as economic growth has been critiqued by other theories which view development from a social and human development perspective, development from an ecological perspective and the more recent theories on development that view it as an integrated approach. International commitments such as the SDGs adopt an integrated approach.

The findings in the literature reveal the interconnectedness of education as a means to development, especially investment in primary education. Studies from more developed nations such as East Asia have shown remarkable results that prove the benefits of having the right policies and investing in education. The chapter also discussed various education indicators recognised internationally which form a basis for measuring educational success. More relevant to this study is **Table 2.5**, which shows selected target areas and indicators with attention to primary education as the main research study focus. These indicators, or a selection of them, can be used to track progress in terms of educational development.

Table 2.5: Selected SDG4 Indicators and target areas

SELECTED TARGETS AND INDICATORS SDG4
<p>Target 4.1 By 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes</p> <p>4.1.1 Proportion of children and young people (a) in Grade 2 or 3; (b) at the end of primary education; and (c) at the end of lower secondary education achieving at least a minimum proficiency level in (i) reading and (ii) mathematics, by sex</p> <p>4.1.2 Administration of a nationally-representative learning assessment (a) in Grade 2 or 3; (b) at the end of primary education; and (c) at the end of lower secondary education</p> <p>4.1.3 Gross intake ratio to the last grade (primary education, lower secondary education)</p> <p>4.1.4 Completion rate (primary education, lower secondary education, upper secondary education)</p> <p>4.1.5 Out-of-school rate (primary education, lower secondary education, upper secondary education)</p> <p>4.1.6 Percentage of children over-age for grade (primary education, lower secondary education)</p> <p>4.1.7 Number of years of (a) free and (b) compulsory primary and secondary education guaranteed in legal frameworks</p>
<p>Target 4.5 By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations</p> <p>4.5.1 Parity indices (female/male, rural/urban, bottom/top wealth quintile and others such as disability status, indigenous peoples and conflict-affected, as data become available) for all education indicators on this list that can be disaggregated</p> <p>4.5.2 Percentage of students in primary education whose first or home language is the language of instruction</p> <p>4.5.3 Extent to which explicit formula-based policies reallocate education resources to disadvantaged populations</p> <p>4.5.4 Education expenditure per student by level of education and source of funding</p> <p>4.5.5 Percentage of total aid to education allocated to least developed countries</p>
<p>Target 4.6 By 2030, ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy</p> <p>4.6.1 Proportion of population in a given age group achieving at least a fixed level of proficiency in functional (a) literacy and (b) numeracy skills, by sex</p> <p>4.6.2 Youth/adult literacy rate</p> <p>4.6.3 Participation rate of illiterate youth/adults in literacy programmes</p>
<p>Target 4.a Build and upgrade education facilities that are child, disability and gender sensitive and provide safe, non-violent, inclusive and effective learning environments for all</p> <p>4.a.1 Proportion of schools with access to: (a) electricity; (b) Internet for pedagogical purposes; and (c) computers for pedagogical purposes; (d) adapted infrastructure and materials for students with disabilities; (e) basic drinking water; (f) single-sex basic sanitation facilities; and (g) basic handwashing facilities (as per the WASH indicator definitions)</p> <p>4.a.2 Percentage of students experiencing bullying in the last 12 months</p> <p>4.a.3 Number of attacks on students, personnel and institutions</p>
<p>Target 4.b By 2020, substantially expand globally the number of scholarships available to developing countries, in particular least developed countries, small island developing States and African countries, for enrolment in higher education, including vocational training, information and communications technology, technical, engineering and scientific programmes in developed countries and other developing countries</p> <p>4.b.1 Volume of official development assistance flows for scholarships by sector and type of study</p> <p>4.b.2 Number of higher education scholarships awarded by beneficiary country</p>
<p>Target 4.c By 2030, substantially increase the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially least developed countries and small island developing States</p> <p>4.c.1 Proportion of teachers in: (a) pre-primary education; (b) primary education; (c) lower secondary education; and (d) upper secondary education who have received at least the minimum organized teacher training (e.g., pedagogical training) pre-service or in-service required for teaching at the relevant level in a given country, by sex</p> <p>4.c.2 Pupil-trained teacher ratio by education level</p> <p>4.c.3 Percentage of teachers qualified according to national standards by education level and type of institution</p> <p>4.c.4 Pupil-qualified teacher ratio by education level</p> <p>4.c.5 Average teacher salary relative to other professions requiring a comparable level of qualification</p> <p>4.c.6 Teacher attrition rate by education level</p> <p>4.c.7 Percentage of teachers who received in-service training in the last 12 months by type of training</p>

Source:(UNESCO, 2018a)

The following chapter will discuss the implementation of free primary education in Malawi by giving a background to the era before the introduction of the FPE policy and post-FPE policy introduction. After this, an assessment of the alignment between Malawi's Primary Education Policy and the SDG 4 will be conducted.

3 Chapter 3 Legislative and Policy Framework on Education in Malawi

3.1 Introduction

Moving on from the preceding chapter, which provided an overview of the pertinent literature in our current field of research, it is relevant to explore legislation and policies that specifically have a bearing on the study being undertaken. This chapter will discuss the introduction of primary education policy within the African context. More specifically, the chapter will provide a background on the development of education policy over time in Malawi, which will be followed by an overview of various regulatory frameworks, both local and international. For instance, at the local/national level, the Malawi Constitution and the National Education Policy (NEP) amongst other relevant legal measures for implementing primary education policy will be discussed.

Malawi as a nation has historically been a party to different international state treaties which endorse primary education. This chapter will discuss some of these treaties, including the African Charter on the Rights and Welfare of the Child (the ACRWC); the Convention on the Rights of Persons with Disabilities (the CRPD); and United Nations (UN) Convention on the Rights of the Child (the CRC) among many others. The chapter will also focus on assessing the alignment of the Malawi Primary Education policy and the SDG 4.

3.2 Introduction of primary education policy: African context

Policies on primary education gained pre-eminence at a much later stage in Africa than elsewhere. This is in comparison to other developed nations such as the United Kingdom (UK) and France, which had primary education policies by 1971 (Ou, 2016:529). Two to three decades later African countries such as Malawi (1994), Uganda (1997), Tanzania (2001), Zambia (2002) and Kenya (2002) introduced such policies (Riddell & Abby, 2004).

The development of many global agendas such as MDGs and the recent and more commonly adopted SDGs has led to countries joining forces worldwide in order to work towards achievement of the stipulated development goals. Statistics reveal that worldwide “59 million children and 65 million adolescents are out of school and more than 120 million children do not complete primary education” (Brende, 2015). Of particular significance to the current study is the fact that education is one of the core goals in these agendas. Of particular interest is the issue of primary education policy, which has aroused remarkable interest globally, so much so

that many authors have written on African countries that have also recently adopted such policies on free primary education such as Uganda, Tanzania, Kenya, Madagascar and Zambia to mention just a few (Inoue & Oketch, 2008; Kadzamira & Rose, 2001; Lassibille, Tan, Jesse & Nguyen, 2010; Mahunda, 2012; Oketch, Mutisya, Ngware, Ezeh & Epari, 2010; Riddell & Abby, 2004; Williams, 2017).

3.2.1 Primary education quality and access in Africa

According to Easterly (2009:29), most African countries expanded primary school enrolment or access in a substantial way. However, such a development raises issues of quality in the various education institutions. Quality in this context may be deduced to be the amount of learning taking place among all children enrolled (Taylor & Spaul, 2015:48). In a recent discussion on education in sub-Saharan Africa, it was stated that “the rapid increases in school enrolment almost certainly have reduced school quality as schools became overcrowded and existing resources were strained” (Glewwe, Maiga & Zheng, 2014). It can be said, however, that there seems to be confusion regarding the relationship between access to education and quality, mainly because measures of access to education are handled separately from measures of quality (Taylor & Spaul, 2015:48). Governments need to take a leading role as enforcers of the law by ensuring that while they are working towards increasing enrolment, standards of quality are clearly defined and achieved.

Manrique Gil (2015) acknowledges that increasing access to quality education is essential to development and that global poverty is estimated to reduce by 12% if all children in the low-income countries could access quality education services. On the other hand, Kenny (2014) argues that at the international level there is no connection between a population that is more educated and tremendous increase in economic development. For example, it was reported that by the year 2010 the average Kenyan student attended more years in school compared to the number of years an average French citizen had spent in 1985. However, the GDP per capita of the country Kenya in 2010 amounted to only 7 percent of France’s GDP per capita two decades earlier (Kenny, 2014). Brende (2015), a proponent of this view, concurs with this argument that access to quality education and likelihood of the country’s development are interrelated.

The SDG 4 aims at improving the quality of education and making this education accessible at all levels. In as much as the policy is essentially meant to be beneficial, there are many role players or institutions that are needed in order for these benefits to be accrued. Introduction of free primary education alone may not lead to a country’s development; factors such as the

quality of education being offered may need to be scrutinised and it is also important for a country to define the terms of what constitutes quality.

A study on primary education policy conducted in Madagascar discusses that low-income African countries in the last decade have made tremendous progress in increasing access to primary education; nevertheless, the education systems have been delivering poor results and ultimately risking the goal of universal primary education (Lassibille *et al.*, 2010:310). In a similar study, Crouch and Vinjevold (2006) argue that in as much as various countries have succeeded in improving access and quality, Southern Africa is a peculiar case as it has placed much emphasis on access while overlooking learning and its importance. Such imbalances in terms of access, quality and learning have been discovered to be caused by administrative systems or institutions that are weak, poor governance and insufficient focus on results, among other reasons. A balance is therefore required in terms of access and quality.

Recently a study was done on Southern and East African countries that aimed at measuring access to learning compared to increased access to schooling. A study conducted by Taylor and Spaul (2015:47) reported that increasing access to schools has caused weakening and ineffectiveness in the education system over time, hence no learning ensued. It is probable that overlooking such pertinent issues may be what deters a country from achieving economic development through education.

Weaver *et al.* (1997:166) report on different studies which reveal that investment in education yields high rates of return, and the increase in enrolment rates is positively correlated to increase in economic growth in sub-Saharan Africa. However, governments need to come to the realisation that public funds and public policies should prioritise services that offer the largest benefits to the community or country at large (Weaver *et al.*, 1997:164). For example, public initiatives need to give priority to primary education as well as basic literacy and numeracy.

3.3 Background to education policy in Malawi

It is often stated that in order to understand the present we must know the past. Likewise, to better understand the current policy and legal frameworks on education in Malawi, it is quite crucial that we understand the socio-economic context, and the history of education policy and legislation of the nation beforehand. Malawi is classified as one of the least developed countries in the world (United Nations, 2018) and reported as a highly indebted country (IMF, 2018:).

The country's public debt has been rising over time (see Figure 3.1). Malawi as a country is predominantly rural, characterised by high poverty rates both in the rural and urban areas.

The year 1994 is of great historical significance to the nation. It is the year in which Malawi



Figure 3.1: Malawi Government Debt

Source: tradingeconomics.com

experienced a political transition from one-party dictatorship to a multiparty government system. Following the political transition from a one-party to a multiparty democratic system, the Malawi Constitution was drafted and approved by the parliamentary committee. Article 13 of the Malawi Constitution places emphasis on the state having to adopt and implement policies and legislation in the education sector that are aimed at eliminating illiteracy, providing compulsory primary education that is free for all the citizens, ensuring greater accessibility to higher education and continuing education, and promoting national goals.

1994 is also the year which saw an education policy reform. According to the Ministry of Education and the Malawi National Commission for UNESCO (2004:8), the broad aim of the policy on education is developing a system that is efficient and of high quality.

The Vision 2020 National document was produced 4 years after the multiparty system was established. According to the Vision 2020 strategy, in addressing challenges for education the aim is to improve access, quality and equity in education at all levels of education, namely primary, secondary and tertiary education (Malawi National Economic Council, 1998). Improving access, quality and equity is stated to mainly be achieved through the following

“(a) continuing with the policy of free primary education;
 (b) making primary education compulsory;
 (c) construction of additional units by both the public and private sectors;
 (d) introducing free and compulsory secondary education;
 (e) increasing the numbers of teachers and college tutors;
 (f) providing more and better school facilities;
 (g) providing adequate learning materials;
 (h) introducing entrepreneurial subjects in curricula;
 (i) increasing budgetary allocations to primary education;
 (j) encouraging preventive maintenance for buildings and equipment,
 (k) rehabilitation of buildings;
 (l) establishing and enforcing minimum standards for secondary schools;
 (m) reviewing the selection process to secondary education to ensure that it is fair and contributes to quality sustenance;
 (n) providing students with adequate appropriate instructional materials;
 (o) establishing a textbook fund for replacement and maintenance of instructional materials;
 (p) providing library facilities to all secondary schools; and increasing collaboration with communities, NGOs and the general public in the provision of secondary school education;
 (q) introducing compulsory free primary and secondary education and changing attitudes towards education;
 (r) making curricula sensitive to gender issues;
 (s) ensuring appropriate designs to cater for people with disabilities;
 (t) strengthening the guidance and counselling services in order to address the academic, psychological and socio-cultural needs of pupils;
 (u) increasing the number of well trained teachers and reducing teacher pupil ratios;
 (w) and improving the production and distribution of learning materials” (Malawi National Economic Council, 1998).

Ultimately, the government of Malawi is tasked with the duty of being the main provider of education at all levels; nevertheless, the private sector is also presently active in providing education services at primary, secondary and tertiary level (The Ministry of Education and the Malawi National Commission for UNESCO, 2004:10).

3.4 National development policies relevant to education

For over five decades Malawi had been using the Education Act of 1962 to manage the education system (Kondowe, 2015). The Education Act of 1962 was formulated before the country gained independence. Recently, there has been a growing interest in education development, so the Malawi Civil Society Education Coalition (CSEC) undertook various advocacy initiatives with various partners and this led to successful revision of the Education Act. The CSEC saw the need for change as other policies such as free primary education were not yet incorporated into the Education Act of 1962. The more recent education legislation governing the education system is the Education Act of 2012.

Before 1994 the government of Malawi had formulated the Education Development Plans (EDP) in an attempt to develop the education system. The EDP was what guided the education system; it was implemented in two phases.

To begin with, the period 1973-1980 was when the first EDP was formulated. This first guideline was a significant part of the nation's strategy for development. However, it was not comprehensive and offered guidelines on education development that were inadequate as not all levels of education were incorporated (Chimombo, 2009:299). Some of the core objectives of the first EDP included: fulfilling the precise requirements of the labour marketplace, developing school curricula that prove to be pertinent to the socioeconomic and environmental needs of the nation, improving efficiency in terms of utilization of facilities and resources, and attainment of impartial distribution of education facilities and resources (The Ministry of Education and the Malawi National Commission for UNESCO, 2004:11).

Through the EDP the 8-4-4 education system was conceived. Eight years are meant to be dedicated to primary education. Upon successful completion of this phase, the student sits for a national examination where they are granted a Primary School Leaving Certificate (PSLCE), after which they are eligible to proceed to four years of secondary school. They can then enter into the competitive process of attaining tertiary education, where four years are required to complete the degree. Currently, Malawi continues to use the same education system of eight years of primary education, four years of secondary education and four years of university education (i.e. the 8-4-4 system of education).

The second EDP was established in the period 1985-1995. It stipulated four main objectives: equalizing education opportunities, promoting an efficient system, improving physical and

human resources, and careful usage of the limited resources. EDP II focused more on investing in education at primary level; this was unlike EDP I which placed much emphasis on post-secondary education. EDP II aimed at improving accessibility, quality and efficiency at the primary level (Chimombo, 2009:299). It was during this second EDP that free primary education was introduced.

After 1994 a third EDP was introduced in the period 1995-2005. The government of Malawi during this same period devised the Education Policy and Investment Framework (PIF) with the aim of addressing the various issues the education sector was facing at the time (Ministry of Education and the Malawi National Commission for UNESCO, 2004:11). Even though the PIF was introduced during the same period of discussions on free primary education, it did not incorporate the implication of such a policy for the education system (Chimombo, 2009:299).

The education sector during the period 2006-2007 was guided by the MGDS 2006-2011, which was devised under the regime of the late Dr Bingu wa Mutharika. The government at the time was undertaking various education reforms aimed at improving the current education system in terms of access, retention, quality, equity, management and supervision and training of teachers at all levels (primary, secondary and tertiary) (Malawi, 2006:41). The three main goals of the education system were to “to equip students, especially at the basic education level, with basic knowledge and skills to enable them to function as competent and productive citizens; at secondary level, to provide the academic basis for gainful employment in the informal, private and public sectors; and at tertiary level, to produce high-quality professionals with relevant knowledge and skills in relevant fields” (Malawi, 2006:43).

3.4.1 The Malawi Constitution

According to the Malawi Constitution, which was drafted shortly after the transition of the political system to a multiparty democracy in 1994, the education sector is intended to provide all the necessary resources and develop programmes aimed at eliminating illiteracy in the country, ensure primary education is compulsory for all the citizens, increase access to higher learning, among many others, and ensure that national goals are promoted (Malawi, 1994:12).

The Malawi Constitution (article 25) states that “All persons are entitled to education. Primary education shall consist of at least five years of education. Private schools and other private institutions of higher learning shall be permissible, provided that: a) such schools or institutions

are registered with a state department in accordance with the law, and b) the standards maintained by such schools or institutions are not inferior to official standards in state schools.”

The Malawi Constitution (2010) (Chapter 4 Section 11(1)) further acknowledges that among other human rights issues discussed, all the children irrespective of their individual circumstances, are subject to receiving equal treatment and that all decisions that have an effect on them should regard them as the primary consideration. The Constitution further states that all persons are not only entitled to education, but that primary education should consist of a minimum of five years in school (Ng’ambi, 2010:4). However, the country has no legal mechanisms in place to impose this right. As such, no individual – parents or guardians included – can be held legally responsible for not sending their children to school.

Chapter 3 Section 11 (f) of the Malawi Constitution (2010) states that adequate resources must be provided in the education sector and the government must thereby devise strategies aimed at eliminating illiteracy, making primary education compulsory and free to all the citizens of Malawi and there must be provision made for greater access to learning, among many other issues (Malawi Government, 2010). The law in itself is important and if effectively executed may result in long-term development of the nation. However, in reality, different studies have revealed the shortfalls in the education sector (Chimombo, 2005; Nishimura *et al.*, 2009).

3.4.2 The Malawi Education Act of 2012

The education system in Malawi is also governed by the Education Act of 2012. The act was formulated bearing in mind that education is essential for the country’s social and economic development. Section 4 (1) of the Education Act emphasises the promotion of education for all people in Malawi regardless of their race, ethnic origin, religious affiliations, disability or any other discriminatory characteristics (Malawi, 2012:8).

In terms of primary education, Section 12 of the Education Act states that the local government authorities are designated with the responsibility of administering and managing primary schools within their jurisdiction. The local government authority is also tasked with the duty of identifying needs in respect of primary education and schools. This may be in terms of resources, be they financial, human resource staffing and maintenance, to mention just a few.

In addition, Section 13 emphasises free and compulsory primary education in all government schools for all children who are below the age of 14. This is in line with the policy on free primary education introduced in 1994.

3.4.3 Malawi Growth and Development Strategy (MGDS) III

The MGDS III (2017-2022) was formulated with the core theme of “Building a Productive, Competitive and Resilient Nation”. The strategy is reflective of the country’s relationship with the international community. The MGDS III reveals how the global agendas will be operationalized at country level. Malawi is committed to international agendas such as the implementation of the SDGs, MDGs and the Africa Union Agenda 2063 (Malawi, 2017:xiii). The MGDS recognises the crucial role that education plays in achieving economic growth and the SDGs (Malawi, 2017:37). The main goal stipulated in the MGDS on education and skills development is to “improve quality and relevant education and skills for all” (Malawi, 2017:38). The MGDS has a number of outcomes and strategies for education and skills development. In terms of primary education, they can be summarised as in the Table 3.1.

Table 3.1: Primary Education Outcome and Strategy

Outcome	Strategy
Improved Quality and relevance of primary education	<ul style="list-style-type: none"> • Improving teaching inputs to facilitate more effective learning. • Reducing class sizes to facilitate more effective learning through progressively recruiting trained teachers • Enhancing the relevance of primary curriculum. • Ensuring the availability of teaching and learning materials including for special needs learners. • Improving incentives to teachers and supervise their performance. • Improving access to basic health services that meet girls and boys needs in all primary schools. • Regulating and standardizing private sector participation in basic education

Primary education is known to be the foundation of the other levels of education. According to the NEP (2013:5), since the introduction of free primary education the nation has ended up facing various challenges in the current education system, specifically in the primary section. This is due to the fact that the enrolment rate increased substantially, hence creating pressure on learning materials and resources. Given the challenges encountered, the government of Malawi has not been complacent about the findings, but rather devised strategies to tackle the challenges. This has been clearly depicted in the recently devised MGDS III 2017-2022.

3.4.4 National Education Policy

The Malawi NEP (2013) is formulated with the Constitution as a guide. The policy was established in line with the Malawi Constitution on issues regarding increase in access to education (Ministry of Education Science and Technology, 2013:1). According to UNESCO

(2010), the educational policy objective is to develop an efficient system of education that is of high quality and appeals to the political, social and economic aspirations of the nation.

The policy objectives on primary education as stated by the NEP framework aims to ensure the following:

- i. national education standards are adhered to in all schools.*
- ii. primary school curriculum is relevant and responsive to the needs of the country;*
- iii. quality assurance is enhanced;*
- iv. free primary education is compulsory and implemented incrementally;*
- v. continuous assessment in primary education is enhanced;*
- vi. teaching and learning materials are available to all learners;*
- vii. a sustainable and effective school health and nutrition programme including HIV/AIDS education services is enhanced*
- viii. increased numbers of girls equitably access, participate in, excel and complete primary education*
- ix. equitable access to quality and relevant special and inclusive primary education is enhanced*
- x. capacity development in primary education is strengthened; and*
- xi. governance and management of primary education is enhanced”* (Ministry of Education Science and Technology, 2013:6).

Table 3.2 has been devised to compare the alignment of SDG 4 with the objectives of primary education stated by NEP framework.

Table 3.2: Comparison of NEP Objectives and SDG4

Comparison of SDG4 And Malawi NEP objectives on primary education	
NEP Primary Education objectives	SDG4 Target areas
i. national education standards are adhered to in all schools.	4.1 by 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes
ii. primary school curriculum is relevant and responsive to the needs of the country;	4.2 by 2030 ensure that all girls and boys have access to quality early childhood development, care and pre- primary education so that they are ready for primary education
iii. quality assurance is enhanced;	4.3 by 2030 ensure equal access for all women and men to affordable quality technical, vocational and tertiary education, including university
iv. free primary education is compulsory and implemented incrementally;	4.4 by 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship
v. continuous assessment in primary education is enhanced;	4.5 by 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples, and children in vulnerable situations
vi. teaching and learning materials are available to all learners;	4.6 by 2030, ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy
vii. a sustainable and effective school health and nutrition programme including HIV/AIDS education services is enhanced	4.7 by 2030 ensure all learners acquire knowledge and skills needed to promote sustainable development, including among others through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non- violence, global citizenship, and appreciation of cultural diversity and of culture's contribution to sustainable development
viii. increased numbers of girls equitably access, participate in, excel and complete primary education	4. a build and upgrade education facilities that are child, disability and gender sensitive and provide safe, non-violent, inclusive and effective learning environments for all.
ix. equitable access to quality and relevant special and inclusive primary education is enhanced	4.b by 2020, substantially expand globally the number of scholarships available to developing countries, in particular least developed countries, small island developing States and African countries, for enrolment in higher education, including vocational training and information and communications technology, technical, engineering and scientific programmes, in developed countries and other developing countries
x. capacity development in primary education is strengthened; and	4.c: By 2030, substantially increase the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially least developed countries and small island developing States
xi. governance and management of primary education is enhance	

Source: Author's own

In comparing the two frameworks, a number of similarities and difference can be observed. To begin with, SDG4 target 4.1 aims at ensuring that *'all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning*

outcomes'. This can be seen to reflect objectives ii, iii and iv of the NEP. By ensuring that the curriculum is relevant (objective ii) it can be anticipated that the learning outcomes may be effective. Objective iii of the NEP on primary education further highlights on importance of enhancing quality assurance; this is similar to the focus of SDG 4 target 1.

It is important to note that the SDG target areas 4.2 – 4.4 have not been clearly stated among the objectives of the primary education objectives stated in the NEP. However, in reviewing the Malawi NEP in totality, it can be observed that objectives related to early childhood development, secondary, technical, vocational and tertiary (higher) education have also been addressed (Ministry of Education Science and Technology, 2013:8-26).

SDG target 4.5 focuses on eliminating gender disparities and ensuring equal access of education at all levels; this can be clearly seen from viii and ix, whose core focus is increasing equitable access. In addition to increasing equitable access, objective ix emphasises enhancing inclusive primary education; this is similar to SDG4 target 4a.

Another similarity can be observed from target 4.7 which can be achieved at country level by making all teaching and learning materials available, as stipulated in objective vi of the NEP on primary education.

Furthermore, objectives x and xi focus on strengthening capacity development and issues relating to enhancing governance and management respectively; this is comparable to SDG target 4c. The Ministry of Education Science and Technology (MoEST) further describes capacity-building and management reforms as including the training and recruitment of teachers, among many other areas; this is evidently in line with Target 4c.

Ultimately, the objectives at the primary education level seem to be in line with the SDG 4 target areas. Only one objective vii is observed to not be directly related to the SDG 4 target areas as it focuses on the health and nutrition aspects.

In addition to national policies, Malawi also signed into international treaties and conventions that relate to education, discussed in the next section.

3.5 Adopted international conventions and commitments

The government of Malawi has over time approved and permitted a number of international conventions and policy commitments concerning education (Ng'ambi, 2010:4). Some of these are as follows:

- 1990's Jomtien Education for All declaration;
- Sustainable Development Goals;
- Malawi is also a member of the Convention on the Elimination of All Forms of Racial Discrimination, article 5 (e) (v), which forbids any forms of discrimination in the education field.

In addition, the government of Malawi is also a state party to a number of treaties related to this research.

3.5.1 African Charter on the Rights and Welfare of the Child

Malawi, as a member state of this alliance, recognized how paramount children's rights are, one of which is the right to education. Article 11 of the African Charter on the Rights and Welfare of the Child (1990) states that all children are entitled to an education and this education must, among many other things, be focused on promoting the physical abilities and development of the child.

3.5.2 UN Convention on the Rights of the Child

Article 28 of the United Nations Convention on the Rights of Persons with Disabilities aims at ensuring that children with disabilities have equal access to public services and programmes. Education is a public service as it is considered to be a right for all citizens according to the Malawi Constitution (2010). As such, the national education policy covers all Malawians, children with disabilities included. However, given the insufficient resources to adequately meet all children's education requirements, it raises the question of the effectiveness of the primary education policy.

3.5.3 International Covenant on Economic Social and Cultural Rights (ICESCR)

Malawi's signing of the ICESCR is relevant to this study, mainly because of what the country pledged allegiance to. For instance, Articles 13 and 14 of the ICESCR (2015) state that all state parties must recognize that everyone has a right to education. It further specifies that primary education should be compulsory and free to all citizens. This has been reflected in the country's policies.

As a result of such partnerships and developments, education plans have been subject to modifications after perceived weaknesses in earlier policy formulations (Chimombo, 2009:299). The modifications can be said to be a prudent step taken by the government in incorporating new developments on a global scale into local policies as a way of making progress.

3.5.4 Influence of international agendas on education policy

As globalisation continues, so nations continue to work with a common understanding in order to achieve global goals. SDGs are building on the various education development initiatives and policies such as the MDGs, which aimed at improving primary education, among many other goals on their agenda. During 2015 different members of the United Nations agreed on adopting 17 SDGs, of which SDG 4 is the focus of this study. The local governments are supposed to ensure that they do all the necessary things to enable school attendance and enable access to quality education for the primary students (UCLG, 2015). Malawi as a beneficiary of the member states is in essence working towards these goals that build on the Jomtien Declaration, MDGs and various other treaties which ultimately have a bearing on Malawi's policy decisions.

It is clear from the discussion that Malawi adopted a number of specific policies and pieces of legislation to promote the education of its people. However, policy formulation alone does not imply implementation and effective results. It is essential to evaluate whether these policies have indeed been effective and achieved their intended purpose. As an observation, the policy framework document has no clearly specified indicators of the various objectives in the document. However, the National Education Sector Plan (2008-2017) and the Malawi Growth and Development Strategy (2017-2022) provide us with more detailed plans in striving for the achievement of the objectives.

As a result of various education reform processes undertaken during the period 2006-2007, the National Education Sector Plans (NESP) 2008-2017 were formulated. The government of Malawi in its National Education Sector Plan has devised three strategies (priorities) which are aimed at tackling the different challenges faced in the primary education system. The Malawi National Education Sector Plan (2008) three priority strategies are outlined below.

1. To begin with, the first priority is quality and relevance. This primarily entails focusing on issues such as improvement of the teaching inputs so as to enable effective learning and increase learning achievement. Inclusive of this is conducting teacher training from time to time and the recruitment of trained teachers. Another area to focus on with regard to quality and relevance is on the primary education system inspection and supervision such as introduction of incentives to teachers and supervision of their work performance (Ministry of Education Science and Technology, 2008:11).
2. Access and equity are the main focus of the second priority or strategy stipulated by the Malawi government in the National Sector Plans. This priority area aims at increasing the net enrolment and completion rates, while targeting the disadvantaged be it in terms of geographical location, gender and poverty, to mention just a few. Particularly, emphasis will be on the improvement of enrolment rates of female students in Grades 5-8. By extension, another strategy would be the development of educational infrastructure such as classrooms and teachers' housing in more rural areas. Thirdly, participation of the private sector in basic education would be optimised. Finally, strengthening complementary basic education modalities for learners would be another way on achieving the second priority area on access and equity (Ministry of Education Science and Technology, 2008:12).
3. The strategies in priority area 3 focus on governance and management. Included in the strategy is firstly mobilising community participation in the 'whole-school development' and management for students who are both normal and have special needs. Secondly, ensuring suitable decentralisation of the delivery of the education-related services. The introduction of policy measures that aim at reducing the class sizes of Standard One and Two, reducing repetition as well as drop-out and enrolment rates of over- and under-age children is another strategy aimed at tackling the challenges faced in the primary education system. Lastly, monitoring performance and strengthening the internal efficiency of sub-

sector is another area of focus on the strategy for governance and management (Ministry of Education Science and Technology, 2008:12-13).

Ultimately, the three strategies outlined encapsulate some of the core components in the Vision 2020 document. Improving access, quality and equity in education through the continuation of the free primary education policy, among many other things, is crucial for the development of the nation of Malawi (Malawi National Economic Council, 1998).

Over the course of time the education system has been influenced not only by internationally recognized agendas such as the MDGs and the more recent SDGs, but also by various nationwide policies and pieces of legislation such as the Constitution, the Malawi Education Act and the MGDS.

3.6 Current national indicators on primary education

A central issue in tracking educational progress is following through the national indicators on education at each specified level: basic education, secondary and tertiary level. Indicators assist in measuring the level at which a contribution to a set goal or strategy has been made. The Malawi National Education Sector Plan (NESP), which is the key document on education policy, outlines the nation's key indicators at all levels of education. The main target areas are enrolment rates, completion rates, staffing levels and teacher distribution to improve by 2017 (Ministry of Education Science and Technology, 2008:26). Specific indicators to primary education are as follows:

- i. Reduced drop out from 14.3 percent to 5 percent,*
- ii. Reduced repetition from 18 percent to 5 percent. Only move towards automatic promotion upon developing mechanisms for remedial measures for failing pupils and improving teaching and learning which reflects successful continuous and summary assessment,*
- iii. Improved distribution of teachers in rural areas from 1 qualified teacher to 90 pupils to at least 1:70,*
- iv. Improve the survival rate of pupils to standard five from 53 percent to 75 percent, and Increase the survival rate from 29.6 percent to 60 percent at standard 8 (Ministry of Education Science and Technology, 2008).*

Further indicators on the teachers' education for primary and secondary education are as follows:

“i. Increasing the supply of teachers with a bias towards increase female throughput for both primary and secondary schools by at least 35 percent,
ii. Mainstreaming of special needs education in at least half of the teacher training colleges,
iii. Institutionalization of In-Service Training (INSET)/Continuous Professional Development for Teachers in the education system,
iv. Increased and rationalized use of teaching staff, and
v. Overall the recurrent budgetary allocation for teacher education ranges between 4.8 percent and 6.1 percent of the total budget during the plan period” (Ministry of Education Science and Technology, 2008).

3.7 Chapter Summary

The chapter provided a brief overview of the background to education policies within the African context and focused on Malawi’s background in terms of education plans before 1994 and after 1994, when the policy on free primary education was introduced. Various pieces of legislation guiding education development over time both locally and internationally have been discussed. As a nation, Malawi has been a member of a number of international coalitions that have influenced and shaped the development of the country’s policies. The recent and renowned SDGs have currently shaped the policies to a great extent – particularly SDG 4, which is related to the focus of this study, is seen to have been reflected in the national primary education policy objectives and the country’s recent strategic goals.

The chapter also aimed to assess the alignment of Malawi’s NEP with SDG 4. The objectives in the primary education policy and outcomes in the MGDS III seem to have aligned with SDG 4 to a certain extent. It can be observed that the country’s policy document is in sync with the global development agenda. However, it is essential to note that it is one thing to have a policy document in place – but unless it has been effectively implemented, it may be rendered useless. It is important to note that education development has transitioned over time from a focus on enrolment “to learning that is inclusive, equitable, effective and relevant”, as stated in the SDG 4 – Education 2030 Agenda (UNESCO, 2016b:25). Another important consideration to note is that the SDG 4 targets cover all the levels of education; however, for the purposes of evaluating Malawi’s primary education policy, the primary focus was on target areas to be assessed for primary education.

The next chapter is on research design and methodology and aims to provide proof on the basis of a longitudinal data analysis on the indicators for effectiveness. It provides the framework for assessing the objectives in the Malawi National Education Policy for primary education as well as outline selected indicators (see Table 5: Selected SDG4 Indicators and target areas to determine progress in educational achievements).

4 Chapter 4: Research Design and Methodology

4.1 Introduction

This chapter analyses the performance of the policy on primary education in Malawi through the use of various indicators. The chapter will also describe the design and methodology adopted in the study and provide a rationale for the chosen method. Evidence will be provided from the literature and the data analysed with the aim of addressing the research objective 4: *To review the progress in achievement of the education policy and development results over the implementation period 1994 to 2016* and also assist in answering the study research question.

4.2 Evaluation design

The primary aim of this study is to conduct an evaluation of the effectiveness of the primary education policy. In doing so, the study aims at understanding whether implementation of the policy and plans has produced the intended outcomes of the policy. In outcomes evaluation research, the purpose is to consolidate answers as to whether a specific policy or intervention has been effective. Through the literature review and secondary data analysis, the effectiveness of Malawi primary education policy is evaluated in terms of the long-term causal outcomes and impacts of the policy against selected indicators for primary education.

4.3 Research method

The research uses a longitudinal evaluation method aimed at evaluating the effectiveness of the primary education policy. A longitudinal study can be described as an observational research method in terms of which data are collected for the same subjects over a period of time. The purpose of such a study is to describe patterns of change and to determine causal relationships. For instance, in this study the subjects (primary pupils) will be studied since the introduction of the policy on free primary education in 1994 and various trends over time will therefore be discussed.

Analysing trends, however, has a few limitations; for instance, little insight is provided into what change occurs or how it happened. A longitudinal study is also known to be very time consuming as you have to study subjects over an extended period of time. The study primarily makes use of already existing data from UNESCO and the World Bank data bank. This is mainly because there was limited access to internal data from the Education Department. As such, there was heavy reliance on publicly available data on selected indicators from trusted sources.

4.4 Indicators

The study has intensively investigated various education indicators both at an international and national level. To narrow down the indicators for this study, I adopted the approach of various authors and researchers who, in a study developed for UNESCO, categorised education indicators into input, process/access and output/outcomes indicators (Scheerens, Luyten & van Ravens, 2011; Vos, 1996a). Input indicators are used for measuring the resources employed (Scheerens *et al.*, 2011:4). Vos (1996b:4) classifies the inputs as the financial and human resources invested in education. Process/access indicators mainly “identify demand factors of potential users and would comprise variables that determine the use and accessibility of the supplied services” (Vos, 1996:4). Lastly, “output and outcome indicators measure the impact of a particular set of policies” (Vos, 1996b:4). Scheerens *et al.* (2011) further describe output/outcome indicators as “achievement and labour market outcomes”. In order to summarise indicators for the study, an input, process and output framework will be used to analyse the data. This is based on Scheerans’s classification of education indicators.

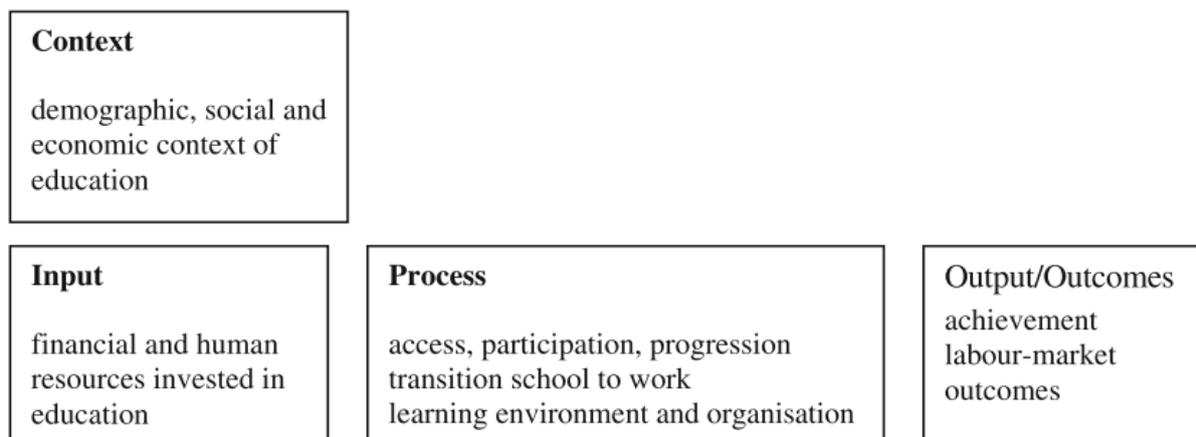


Figure 4.1: Scheerans’s classification of education indicators

Source:(Scheerens *et al.*, 2011:40)

With regards to various internationally devised indicators listed in Chapter 2: [Proposed Education Indicators by other development organisations](#) and Chapter 3: [Current National Indicators on Primary Education](#), a number of indicators have been selected and will be discussed in this section. Figure 4.2 synthesises the selected indicators by categorising them for the purpose of providing an effective analysis which seeks to address the study research objectives. The selected indicators are the final list being tracked in the longitudinal study. Despite several indicators in the education field, the study used the selected indicators with available data in the public domain.

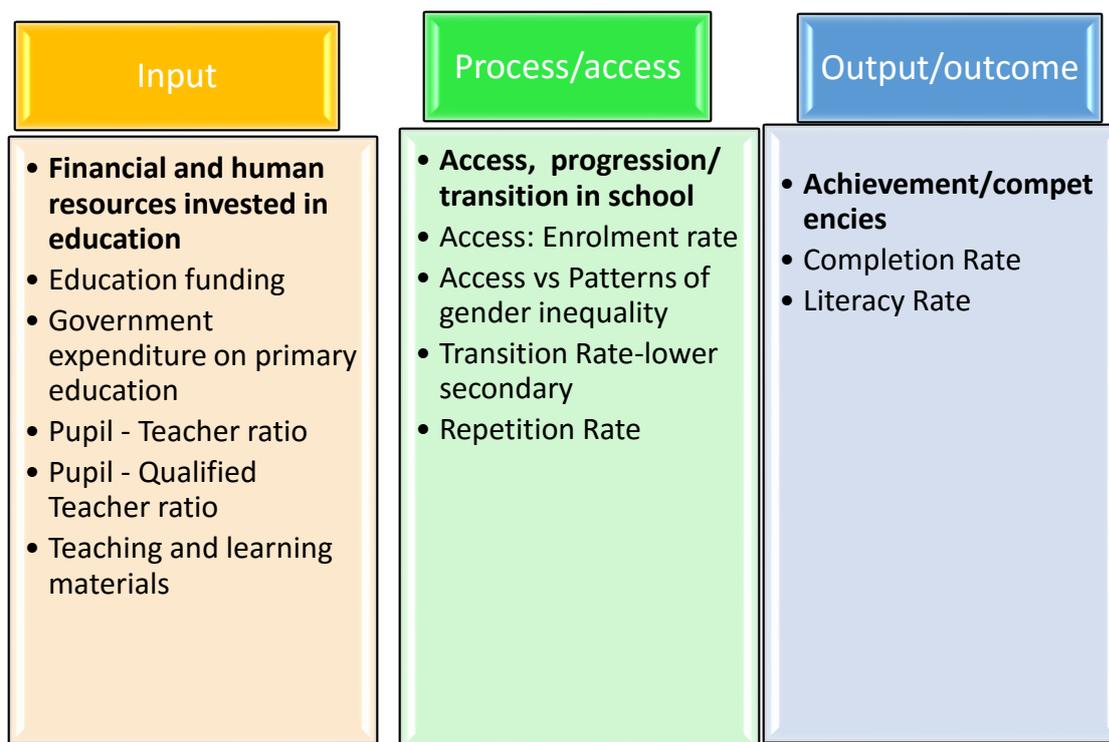


Figure 4.2: Indicators Tracked in the Longitudinal Study

4.5 Data type and source

This study uses a range of secondary data sources. The sources are published academic research studies on Malawi primary education which makes use of Demographic and Health Survey (DHS) data as well as Education Management Information System (EMIS) data from the Ministry of Education, Science and Technology. Other research studies incorporated into the analysis were endorsed by reputable institutions such as the World Bank, UNESCO and UNICEF as well as a report by Malawi National Statistics Office (NSO). Specific emphasis is placed on the data derived from UNESCO and the World Bank as data quality processes in these agencies are carefully controlled through “professional standards in the collection, compilation and dissemination of data to ensure that all data users can have confidence in the quality and integrity of the data produced” (World Bank, 2018b). The World Bank data constitute one of the most prominent databases in terms of socio-economic data and includes a variety of variables. Similarly, UNESCO data can be relied upon as it is the organisation trusted for providing high quality data to its member states. The data available from these prominent organisations is appropriate to address the study’s research question and objectives, and are available for the time period of interest. Internal data from the Malawi government for the time

period when the year policy on FPE was implemented (1994 to the year 2016) are often incomplete, specifically for the years prior to 2000.

Initially the intention was to use official data from the Malawi Ministry of Education, Science and Technology and the NSO as the main data sources. However, this proved futile as the data required for the entire timeframe of the study (1994-2016) were not made available. In addition, reliability of the data was an area of concern, because available data were for short periods of time. As a result of various education reforms and initiatives since the introduction of the policy on FPE, the objectives and indicators in the education system have been refined over time. As such, historical data required to fully inform the analysis of the study were not made available.

The secondary, external data sources identified above serve the purpose of filling the identified gap in locally produced data.

4.6 Presentation of indicators

The following section presents data on the various indicators on primary education that inform this study. In evaluating the effectiveness of the education policy and assessing the system over the course of time, it is necessary to track implementation of the programme across the entire production chain. It is therefore necessary to adopt indicators that focus on the inputs, processes and output/outcome indicators of the education system. The data will be presented as follows: the input indicators, followed by the process/access indicators, and concluding with presenting on the output/outcome indicators.

4.6.1 Input indicators

According to UNESCO (2018), “input indicators focus on the human, financial and material resources that have been assembled and channelled into educational activities”. These inputs are not used in any education system only in order to achieve various educational objectives, but to assist in the delivery of the education service. Examples of such inputs include government budget allocation to education, pupil-teacher ratios, pupil-classroom ratios and percentage of pupils without learning materials such as text books (UNESCO, 2018b). Figure 4.1: Scheerans’s classification of education indicators based on a study for UNESCO, provides a clear illustration.

4.6.1.1 Education funding

Globally, education is seen as a catalyst for national development. It is for this reason that during the 1960s much attention was given to foreign aid assistance to education (Heyneman & Lee, 2016:9). In order to achieve various international education objectives, such as high-

quality education, improvement of infrastructure, increasing access or enrolment, adequate funding for education is vital. A recently conducted study on the effectiveness of foreign aid to education discovered that increasing aid has an impact on the enrolment rate (Heyneman & Lee, 2016b:12).

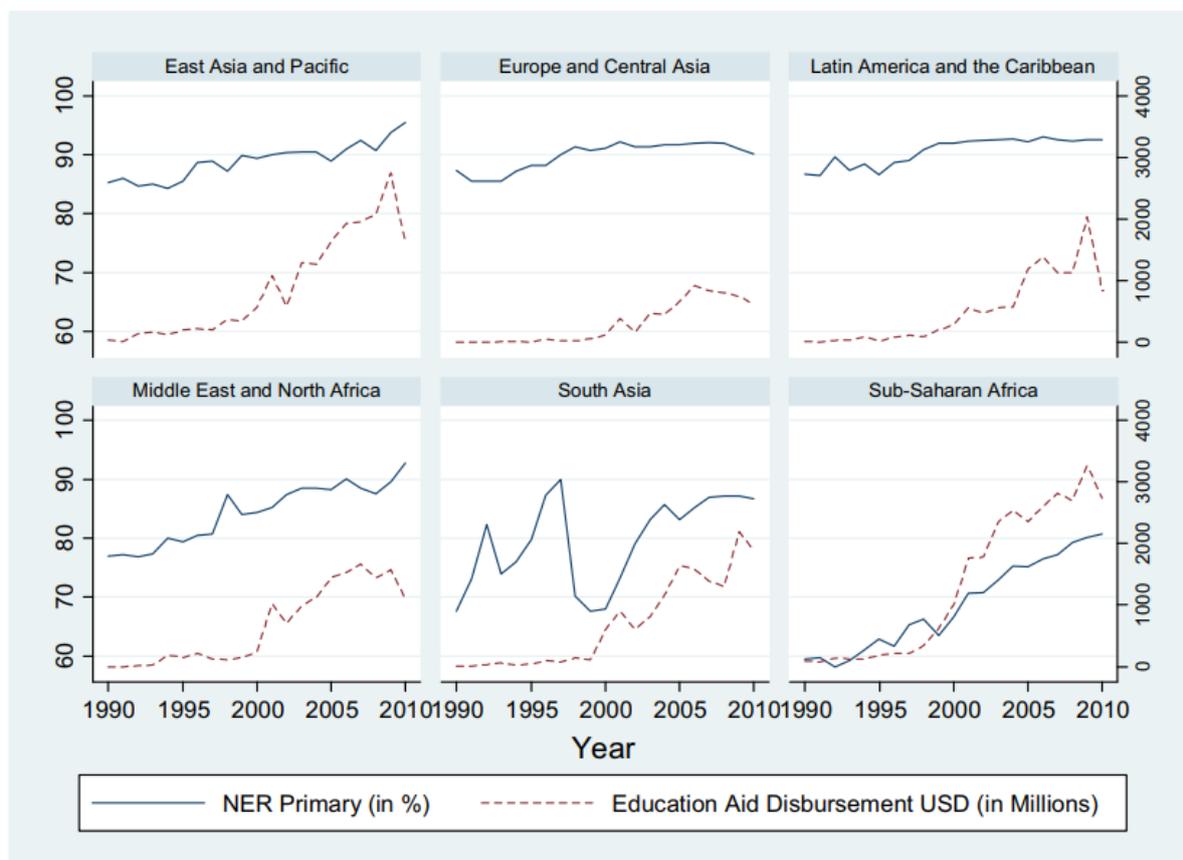


Figure 4.3: Education aid and primary enrolment rate

Source: (Birchler & Michaelowa, 2016:39)

Figure 4.3 reveals the impact that financial aid has on the enrolment rate. As can be seen in all regions (East Asia and Pacific, Europe and Central Asia, Latin America and the Caribbean, Middle East and North Africa, South Asia and Sub-Saharan Africa), one common feature is that the more funding is pumped into the education system, the higher the enrolment rate into primary schools. It can be assumed that the more the finances are allocated to education, the more the system has the capacity to cater to the needs of more students. This can be in terms of infrastructure (number of classrooms, teacher houses and sanitation facilities), learning materials, teacher trainings, education equipment and teacher salaries, to mention just a few.

To take the specific case of Malawi, funding in education cannot be overemphasised if the various objectives in the NEP are to be achieved. Malawi's development rate seems to be low

compared to other nations worldwide. The Human Development Index (HDI), which measures life expectancy, education and income, rates the country 170 out of 188 (UNDP, 2016:2). Although progress over the years has been made and new policies adopted such as free primary education, the country's HDI is lower than the average of low-income countries. According to Weaver *et al.* (1997:167), it was discovered, in comparing the educational budget allocation of most sub-Saharan countries, that Malawi allocated a higher percentage of the education budget towards higher education than to primary education. This is unlike the East Asian countries, which allocate smaller percentages of their budget to higher education compared to the basic education budget. Figure 4.4: Government funding of education gives an indication of education funding in Malawi over the years.

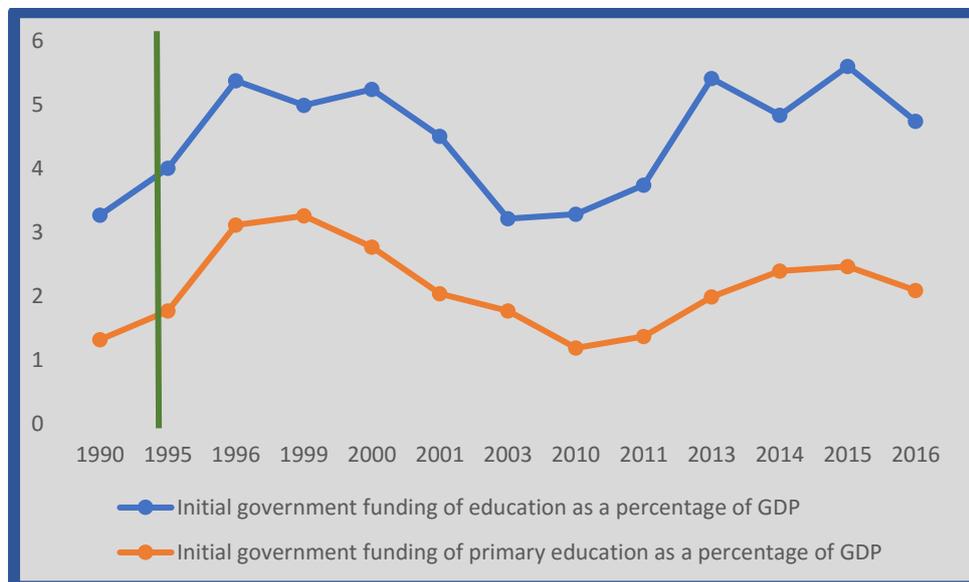


Figure 4.4: Government funding of education

Source: The World Bank

It can be observed from the graph that during the 1990s there was steady rise in initial government funding to the education system in Malawi. This can mainly be attributed to the proceedings of the Education for All (EFA) conference spearheaded by the three Agencies (UNESCO, UNICEF and UNDP) in Jomtien, Thailand in 1990 (Bennell & Furlong, 1998:45). The emphasis was on making universal access to high-quality basic education; the World Bank and other development organisations devoted particular attention to the education sector by providing aid or more funding. It can be seen from the graph that in 1996 there was a sharp increase in the initial government funding. During the same period, the World Bank provided funds worth US\$11.8 million for education-related projects such as building and furnishing

classrooms (Briggs, 2015:201). This may explain the significant increase in funding for education during that time.

However, during 1999 the initial government funding showed a steady decline. This may be attributed to the political transition. In 1999 Malawi held general elections and the country at the time experienced political unrest. Such instability and the changing of government power may have had a bearing on the decline in funding on education at the time.

4.6.1.2 Government expenditure on education

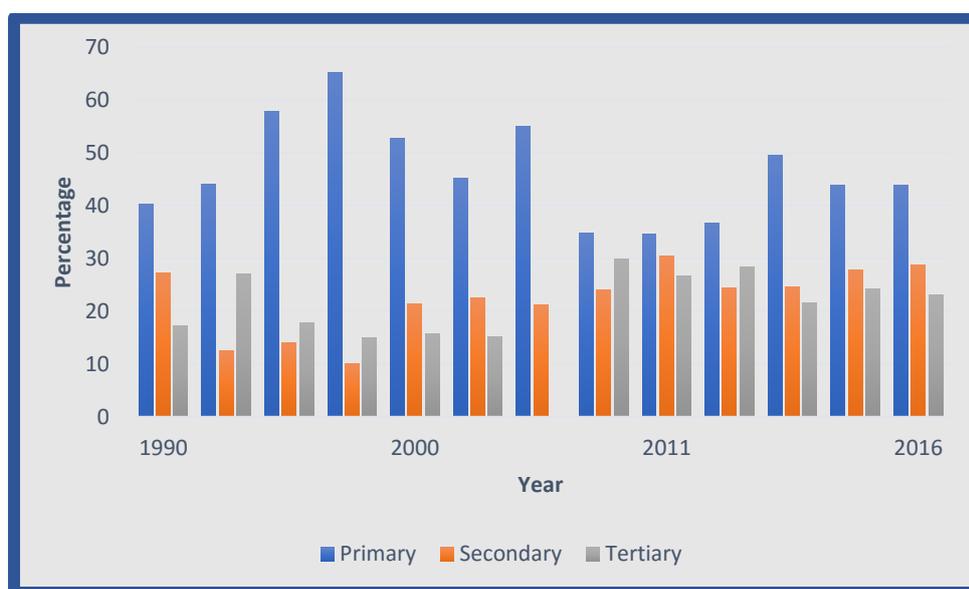


Figure 4.5: Government expenditure on education-all levels

Source: UNESCO

Figure 4.5 above provides a comparative picture of government expenditure on education at primary, secondary and tertiary levels. As can be observed from the figure, this is in contrast to the findings of Weaver *et al.* (1997:167) on Sub-Saharan countries allocating higher percentages to higher education. Ideally, public funding should prioritise primary education and not tertiary (Weaver *et al.*, 1997:164).

The percentage of government expenditure on primary education experienced a sharp increase during the 1990s. As can be observed from the graph, the percent of primary education expenditure increased from 40% in 1990 to 65% in 1999. However, the government expenditure on education started to decline in the year 2000 with a 12% decline from 1999. The expenditure on primary education in 1999 was 65% and it declined in the year following-2000 to 52% and further declined in 2001 to 45%. It can be observed that more funding was

pumped into the secondary and tertiary levels. The expenditure on primary education gradually picked up again in 2003 to 54% but experienced a steady decline in the years following.

The government of Malawi, seeing the importance of primary education and the long-term effects on national development, has since given much attention and allocated more funding to the primary education level. The allocation of funds that prioritises higher education is said to be a violation of good public policy; this encourages the focus of public monies to be on primary education as opposed to university education (Weaver *et al.*, 1997:167). According to a World Bank study, it was reported that primary education receives major funding and that a large proportion (84%) is spent on salaries for the teachers and minimal amount is spent on the inputs necessary for delivering high-quality education (Ravishankar, El-Kogali, Sankar, Tanaka & Rakoto-Tiana, 2016:16). This ultimately has an effect on the learning outcomes of the students.

4.6.1.3 Pupil-teacher ratio

Pupil-teacher ratio has been defined by UNESCO (2018) as the “Average number of pupils per teacher at a given level of education, based on headcounts of both pupils and teachers”. Policy makers and academics hold varied opinions in terms of the long-term effects of the class size and/or the pupil-teacher ratios (Blatchford, Bassett & Brown, 2011; Blatchford, Russell, Bassett, Brown & Martin, 2007; Day, Sammons, Kington, Regan, Gunraj & Towle, 2007; Duflo, Dupas & Kremer, 2014; Finn, Pannozzo & Achilles, 2003; Harker, 2012; Jones, 2016; Masino & Niño-Zarazúa, 2016). On the one hand, policymakers believe learning achievements can improve if the human resources (teachers) are increased, while others focus on refining the way the system is designed in terms of governance and providing adequate incentives (Duflo *et al.*, 2014:92). However, there is general consensus among various researchers that indicates the positive effects of a small class size on a student’s academic performance (Finn *et al.*, 2003:321). In other words, a high pupil-teacher ratio results may have long-term education consequences such as low learning outcomes as little or no attention can be given to individual student learning needs. Below is a graphical presentation of the pupil-teacher ratio. Based on the availability of information in the public domain, the graph shows data with missing values in the early 1990s. However, an analysis of various study findings on primary education since introduction of FPE will be provided to complement where the data were unavailable.

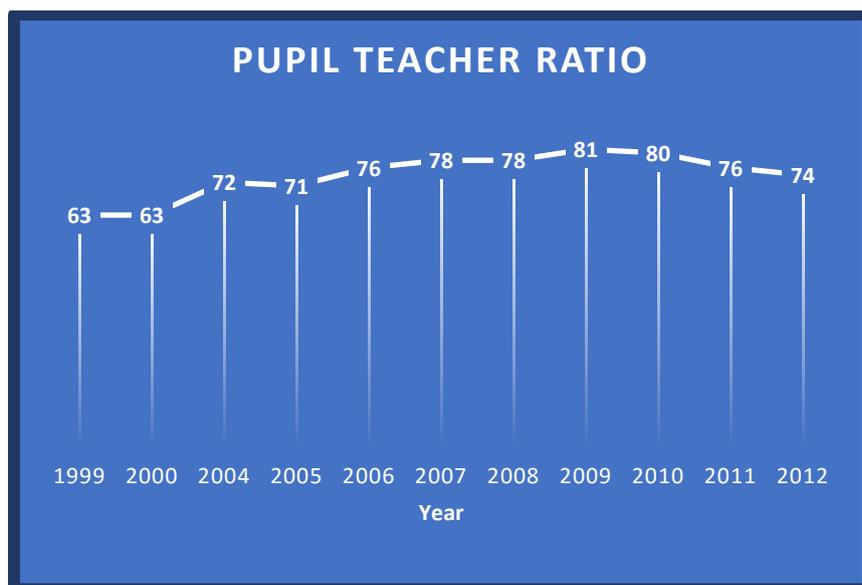


Figure 4.6: Pupil-Teacher Ratio

Source: MoEST-EMIS

Various researchers on primary education in Malawi acknowledge that since the introduction of FPE in 1994, the number of pupils enrolled in primary education increased drastically, hence affecting the pupil-teacher ratio (Chimombo, 2005, 2009, 2001; Kadzamira & Rose, 2001; Riddell & Abby, 2004; Rose, 2003b). The pupil-teacher ratio increased progressively after 1994. It is reported that “the number of pupils per classroom went from 102 in 1992/3 to 422 in 1994/5” (Riddell & Abby, 2004:4).

An analysis of the data in Figure 4.6 shows that there has been a gradual increase in the pupil-teacher ratio. In the year 1999 to 2005 the pupil-teacher ratio increased from 63-71 respectively. Thereafter, a steady increase continues from 2005 to 2011. This clearly reveals the need to deploy more teachers and increase classrooms to meet the high level of student enrolment. A low pupil-teacher ratio is essential for long-term academic achievement. A reduction in the ratio was attained in the years 2012 and 2013 with a pupil-teacher ratio of 74 and 69 respectively. During the years 2014 and 2015 the pupil-teacher ratio of 70 was maintained (World Bank, 2018).

4.6.1.4 Qualified teacher-pupil ratio

It is important to look not only at the pupil-teacher ratios but also at the training and qualifications that primary school teachers hold. A qualified teacher is one with the minimum academic qualifications required to teach at a certain level of education and the qualified pupil-

teacher ratio measures the “average number of pupils per qualified teacher at a given level of education” UNESCO (2016). It has been observed that since the introduction of the FPE policy in 1994, there has been rapid increase in enrolment over the years with a student-teacher ratio of 70:1 and 13 percent of these teachers not having suitable qualifications (Riddell & Abby, 2004:3). Recent findings show that the pupil-teacher ratio of both qualified and unqualified teachers was 66:1 in urban schools and 88:1 in rural schools (UNESCO, 2004:29).

According to a World Bank study conducted in 2003 and 2004, the quality of primary education was questioned as a result of the findings. For instance, although primary teachers in Malawi fared reasonably well in imparting knowledge such as mathematical skills to certain grades, the report concluded that the teachers are not adequately knowledgeable to impart the necessary problem-solving and critical reading skills to higher grade pupils in primary school such as Standards 7 and 8 (Ravishankar *et al.*, 2016:39). Lack of proper training of teachers does affect educational quality, because the success of the student beyond the basic skills is to a great extent dependent on the teachers’ command of their designated subject matter (UNICEF, 2000:14).

Figure 4.7 indicates the qualified teacher-pupil ratio over time.

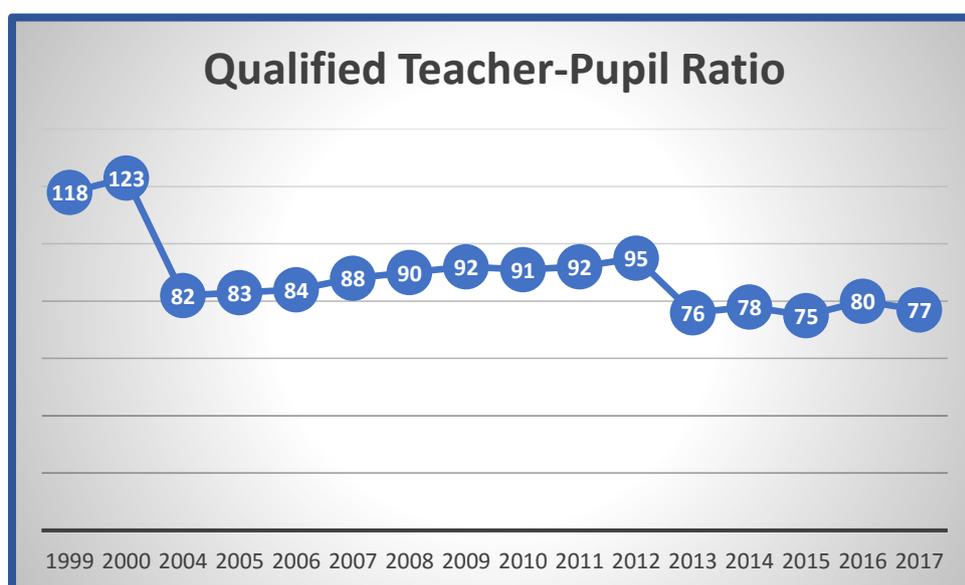


Figure 4.7: Qualified Teacher-Pupil Ratio

Source: EMIS

As can be seen from Figure 4.7, the qualified teacher-pupil ratio is high. *The Nation* online reported that Malawi continues to face a critical shortage in terms of the number of qualified teachers, with a ratio of 1:75 in 2015 (Nyondo, 2016). This is over double the SDG target of 1:31. It is reported that “by 1997, more than half the teachers were untrained, compared with 13% before the introduction of FPE” (Riddell & Abby, 2004:4). The pupil-qualified teacher ratio increased from 1999 (118) to 2000 (123), but it then reduced significantly from 123 in 2000 to 82 in 2004. After that it increased steadily to a pupil-qualified teacher ratio of 95 in 2012. The following years had a notable reduction to 76, 78 and 75 in the years 2013, 2014 and 2015 respectively. This is still over double the SDG target of 1:31. In a more recent report from the Malawi the NSO (2016) concurs with the report and reveals the great improvement in terms of pupil-teacher ratio and pupil-qualified teacher ratio.

Table 4.1: Quality indicators - primary

Quality Indicator - Primary Education	2013/14	2014/2015
Pupil-Teacher Ratio	70	67
Pupil-Qualified Teacher Ratio	78	75

Source: NSO 2016 Report

Despite the reduction of the pupil-qualified teacher ratio over time, it is still far above the SDG goal and may have a negative impact on the achievement of learning outcomes.

4.6.1.5 Teaching and learning materials

Another means through which the policy objective on achieving quality may be achieved is to provide adequate learning materials. Learning materials such as textbooks, notebooks and writing materials, to mention just a few, are essential for an effective learning environment. Different studies on primary education have reported that since introduction of FPE in 1994 teaching and learning materials have been insufficient to meet the learner needs (Chimombo, 2005; Kunje, Lewin & Stuart, 2003; Riddell & Niñ O-Zarazú, 2016). Teachers were forced to deliver under poor conditions (Patrick & Chimombo, 2005:169). The availability of teaching and learning materials is therefore vital and can be tracked against the primary education expenditure on learning materials. Figure 4.8 shows expenditure on school books and teaching materials.

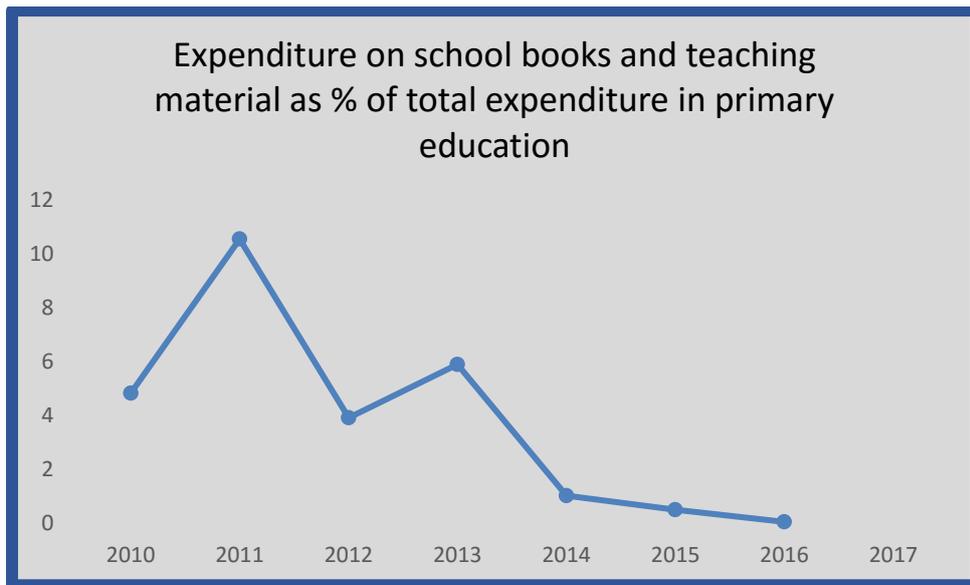


Figure 4.8: Expenditure on books and teaching material

Source: World Bank

Based on Figure 4.8 above, recent trends also show that the proportion of primary education expenditure on school books and teaching materials has been minimal and declining over time. Evidently, priority is given to other items and not the teaching and learning materials. It was reported in a World Bank study that priority is given to the teachers' remuneration, with a significant increase in teacher salaries – see Table 4.2 (Ravishankar *et al.*, 2016:17).

Table 4.2: Public Recurrent Expenditure on Primary Education (MK billion)

	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
Recurring Expenditure	11.15	12.55	15.74	14.34	21.32	24.41	38.47	42.08
Personnel								
Emoluments	8.81	9.65	11.78	12.72	18.16	19.94	29.45	35.19
o/w Teacher								
Salaries	8.12	8.89	10.85	11.72	16.73	18.37	27.14	32.42
Other Recur- rent Transac- tions (ORT)	2.34	2.91	3.96	1.62	3.16	4.47	9.02	6.89
Memo Items:								
Enrolment in Std 1 to 8 (thousands)	3,281	3,307	3,601	3,670	3,869	4,034	4,189	4,498
Recur Exp per Pupil (MK at cur.pr)	3,400	3,796	4,372	3,907	5,512	6,051	9,184	9,356
Recur Exp per Pupil (MK at 10/11 pr)	4,646	4,806	5,091	4,196	5,512	5,622	7,037	5,694
Non-Salary per Pupil (MK at cur.pr)	714	879	1,100	440	818	1,107	2,153	1,532
Non-Salary per Pupil (MK at 10/11 pr)	975	1,113	1,281	473	818	1,028	1,650	932
Salary Share of Recurring Exp	79%	77%	75%	89%	85%	82%	77%	84%

Source: A World Bank Study – Primary Education in Malawi (Ravishankar *et al.*, 2016)

As the years progress it can be observed that the teacher salaries continue to increase. It is reported that the “total salary bill for teachers in primary education grew, in nominal terms, at an average annual rate of 18.3 percent between 2004/05 and 2012/13” (Ravishankar *et al.*, 2016:18). This has been at the cost of expenditure on school books and teaching materials, which is declining over time.

4.6.2 Process indicators

Process indicators reveal how the inputs in the education system have been employed and utilized in delivering services (UNESCO, 2018c). Such indicators provide evidence of activities or essentially what is happening at the classroom level. This may be in terms of access to classes, such as attendance and repetition rates, or the rate at which the learning/teaching materials are being used. Similarly, access to education is an important proxy indicator of assess and whether the education policy is reaching the intended beneficiaries. Access is a central indicator used by various development agendas such as Education for All (EFA), MDGs

and SDGs. Access to education is a core development issue (Lewin, 2007:2). With reference to various development agendas previously mentioned, such as SDGs, access will refer to the ability of all children to have equal opportunities in education, irrespective of gender, social background and mental disabilities, to mention just a few. There is an international consensus that access to education is absolutely essential and it is considered a human right for every child (UNESCO, 2007:8). As such, it is crucial to measure access over time and make improvements where necessary, as “access to education is at the heart of development” (Little & Lewin, 2011:477).

4.6.2.1 Access: enrolment rate

Figure 4.9: Primary education enrolment rate, below provides a picture of the enrolment rates from the period before free primary education was introduced to the period after introduction of the policy.



Figure 4.9: Primary education enrolment rate

Source: UNESCO

It can be observed that there has been rapid increase in enrolment over the years. This is mainly attributed to the fact that primary education was made free. This made it more accessible to low-income and marginalised groups.

4.6.2.2 Primary education access vs patterns of gender inequality

Ensuring equal access to education at all levels – primary, secondary and tertiary education – is one of the central features of SDG 4. Malawi experienced increased enrolments in primary schools during 1994/95 following the introduction of the FPE policy; however, enrolment increases revealed patterns of gender inequality, with boys primarily responding in a favourable

manner to the policy as compared to the girls (Chimombo, 2009:301). According to a more recent study on education, it was found that gender patterns in access to learning in African countries such as Mozambique, Zambia, Uganda and Malawi show that girls seem to have lower access to learning in comparison to boys (Taylor & Spaul, 2015:54).

Figure 4.10 shows primary education enrolment rates with respect to gender.

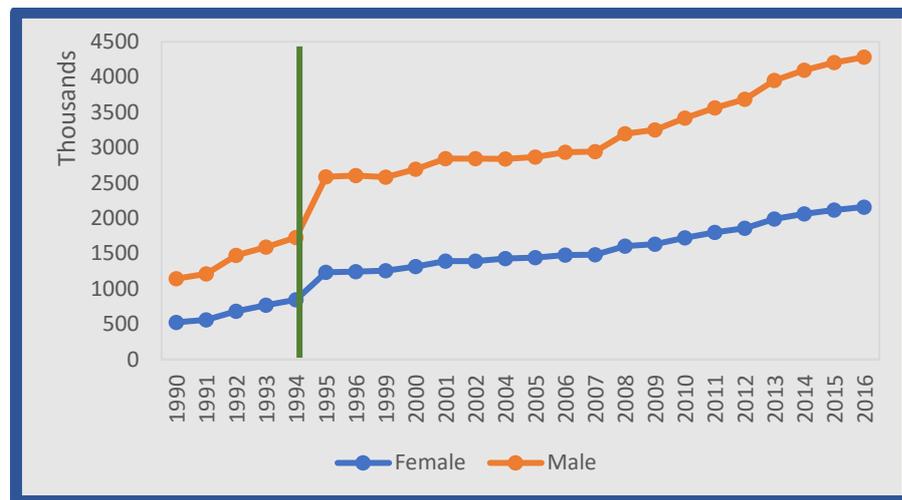


Figure 4.10: Primary education enrolment by gender

Source: UNESCO

Evidently, gender disparities can be observed from the period before primary education was made free up to the present. Even though it has already been emphasised and clearly outlined in law that everyone has the right to education, disparities between the two sexes continue to prevail. The number of male students enrolling for primary education is relatively higher than that of females. Economic and social factors seem to play a major role in preventing more girls from accessing education at the same rate as boys (Dube Senior Lecturer, 2015:280). The international agenda for education aims to tackle such issues and it can be noted that as a nation Malawi is still lagging behind in closing the gap.

4.6.2.3 Transition rate

In global discussions on education the rate at which students' progress to higher education levels is also known as the transition rate; failure to transition can be attributed to a number of factors. In this study successful transition from the primary to the secondary level of education may be attributed to issues such as access, the quality of education being offered, percentage of qualified teachers, availability of learning materials, access to basic services and the school environment. All these factors play a key role in the success of a student to transition to the next level.

Figure 4.11 indicates the rates of effective transition from primary to lower secondary education level in Malawi.

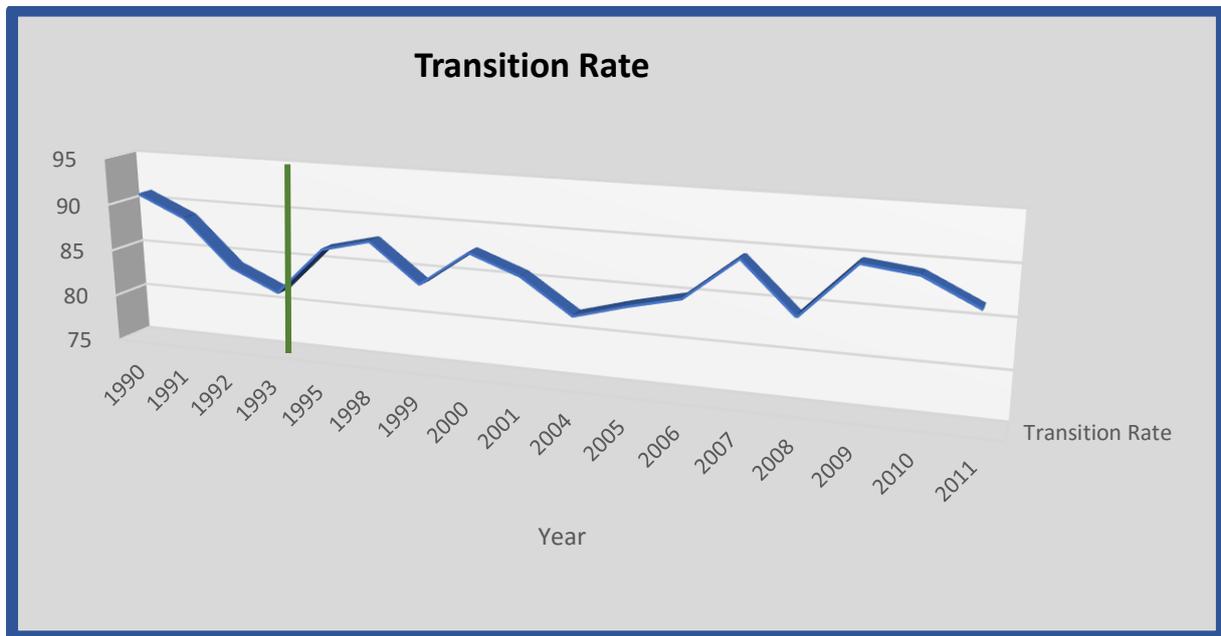


Figure 4.11: Transition rate primary to lower secondary

Source: World Bank

As shown in Figure 4.11, before the FPE was introduced in 1990-93, the transition rate was declining at a rate of 91 percent in 1990 to 82 percent in 1993. The transition rate steadily increased during the era after the introduction of FPE. This may be attributed to the students having adequate resources to boost their academic performance. A considerable amount of resources was pumped into the primary education system as the policy was newly introduced at the time; this may have had a positive impact on the transition rate. In 1995 the transition rate was at 87 percent and increased to 88 percent in 1998. The trend in the transition rate to lower secondary seems to be unstable and has shown variations over time.

A report by NSO indicated that the transition rate from primary to secondary education in 2013/14 and 2014/15 in Malawi was 36 percent. This is relatively low and can be attributed to various reasons. Currently, “16% of the children transition from primary school to secondary, and 8% transition to tertiary education”(Malawi, 2017:37). There seems to be a sharp decline, which raises questions about the quality of education being offered.

4.6.2.4 Repetition rate

Figure 4.12 indicates the repetition rates in primary to lower secondary education.

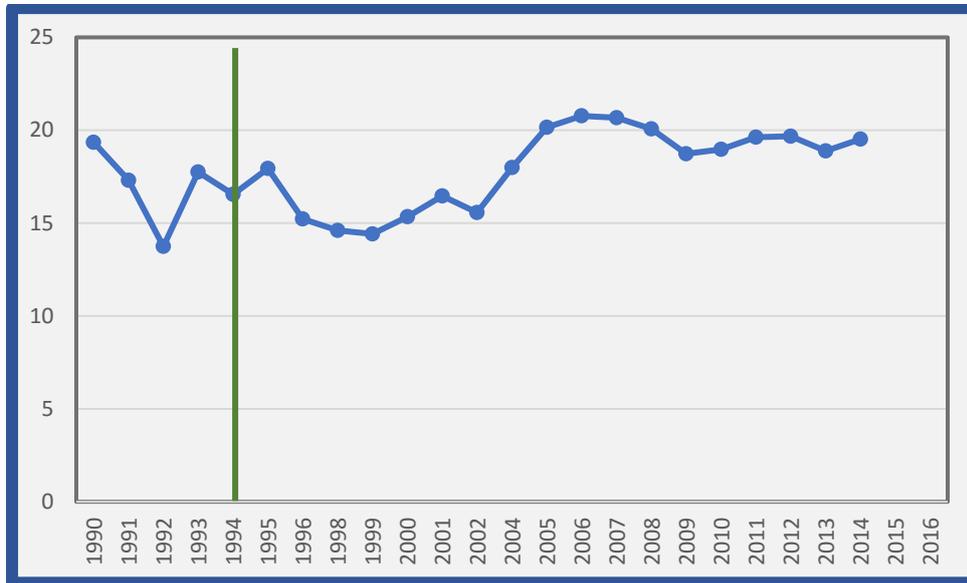


Figure 4.12: Primary Repetition Rate

Source: UNESCO

The repetition rate increased drastically from 1995 in comparison to 1994. This can be attributed to the increased enrolment rates, which were a result of the free primary education policy. The immediate effect of such a policy seems to have been negative. However, the high repetition rates can be attributed to lack of capacity to effectively meet the needs of all the students enrolled at the time.

It can further be deduced from Figure 4.12 that the quality of primary education offered at the time may have been influenced by challenging circumstances, hence resulting in more students repeating. In order to improve the access to and quality of primary education in Malawi, the MGDS III has a strategy in place that aims to ensure availability of learning materials, as presented earlier in Table 3.1.

4.6.3 Output/outcome indicators

In order to conduct an evaluation of the final results of the inputs and entire processes in education, outcome indicators are essential. This is mainly because outcome indicators are used in measuring how effective the education policy implemented has been. The completion rate and literacy rates have been identified as the main output/outcome indicators.

4.6.3.1 Completion rate

The completion rate will measure the number of students to complete their studies. Figure 4.13 provides a graphical presentation of the primary education completion rate with respect to gender.

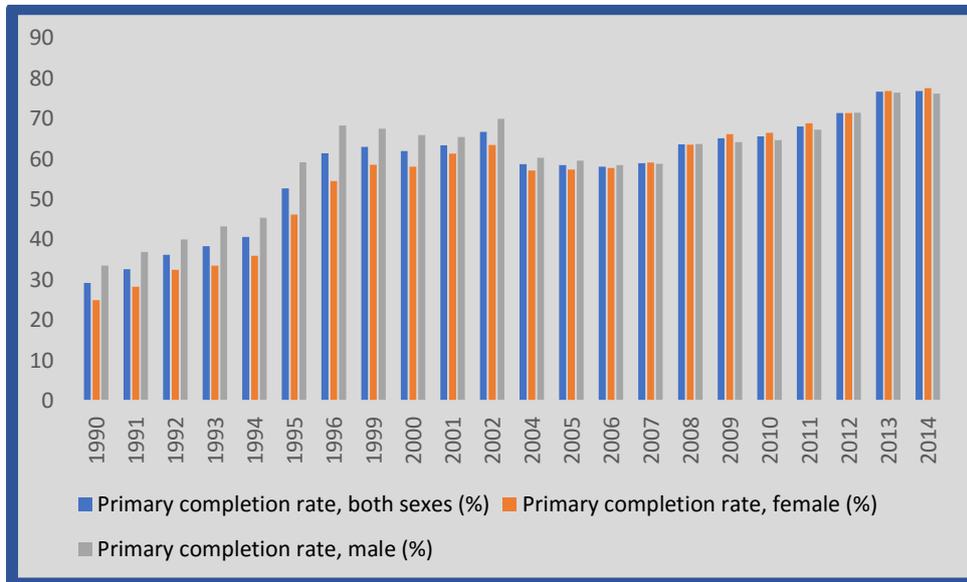


Figure 4.13: Primary completion rate

Source: World Bank

The primary education completion rate for both sexes seems to have been increasing over the years with slight variations. During the years before primary education was free, the completion rate in primary school education was relatively lower compared to completion rates after free primary education policy was implemented in 1994. This may be explained by students opting to remain in the schooling system as affordability of education fees is no longer a concern. The first cohort to complete primary education after 8 years since the introduction of free primary education in 2002 was 66.7 percent. In the years after that, the completion rate seemed to be declining, only to reach a peak later in 2008.

4.6.3.2 Literacy rate

One of the most fundamental indicators to measure that is relevant to the development of a nation is the literacy rate. It can also be used to assess the effectiveness of an education system. The literacy rate is an indicator that is used in evaluating educational attainment in a country. According to Stromquist (2005:12), “literacy skills are fundamental to informed decision-making, to active and passive participation in local, national, and global social life, and to the development and establishment of a sense of personal competence and autonomy”. The

benefits of literacy can be further categorised into human benefits, political benefits, cultural benefits, social benefits and economic benefits (UNESCO, 2006:137-145).

Table 4.3 and Figure 27 indicate literacy rates in Malawi.

Table 4.3: Literacy Rate

Year	Total	Male	Female
1987	48,54	65,28	35,32
1998	64,13	74,93	54
2010	61,31	72,1	51,25
2014	65,15	75,98	55,13
2015	62,14	69,75	55,2

Source: UNESCO UIS

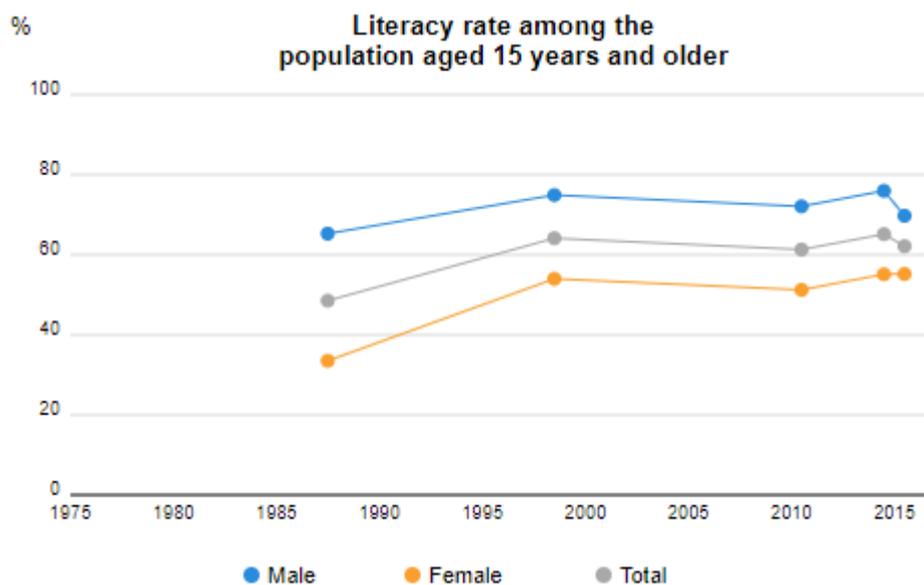


Figure 4.14: Literacy rate

Source: UNESCO

As can be seen from Figure 4.14 the literacy rate seems to have increased from 1987 to 1998. An increase in the literacy rate may be attributed to the educational reforms that have been implemented in Malawi over time. However, from 1998 to 2010 the literacy rate declined from 64.13 to 61.31 percent as presented in Table 4.3.

Between 2010 to 2014 we notice an increase from 61.31 to 65.15 percent. This may be a result of the Malawi education sector reforms which occurred at the time. A policy handbook was developed for the period 2010-2013 and some of the target areas were to improve efficiency in

the education system, such as reducing repetition and dropout rates (DFID, 2010:1). The education reform may have had a positive bearing on the increase in literacy rates. The recent results for 2015 on Malawi's literacy rate is 62.14, which is about a three percent decline from the year 2014. In terms of gender, the literacy levels for women seem to be lagging as compared to men.

4.7 Conclusion

This chapter discussed the research design and methodology, it also provided an assessment of primary education policy through past and recent research findings. On the one hand, studies of the policy seem to recognise the progress of the education system over time, while on the other hand, critiques have raised questions about issues of access, quality and inequality, among many others. Presentation of the data was integrated with the various previously conducted research studies of a similar nature as a way of assisting in the analysis and interpretation of various trends.

5 Chapter 5: Discussion of Findings

5.1 Introduction

This chapter aims at providing a synopsis of the study on evaluating the effectiveness of the Malawi primary education policy. A summary of the main research findings will be provided. Conclusions based on insights gained from each chapter as they sought to address particular research objectives will be presented.

5.2 Summary of previous chapters

The first chapter aimed at giving an introduction and snapshot of the research study conducted. Firstly, background to the research study was presented, which revealed the international recognition of the importance of education for all children. This is evident in the various global coalitions that nations form and consequently formulate country-specific policies in line with such agreements. Malawi as a nation has been a part of such international agendas since independence in 1964. For example, Malawi was the first country in sub-Saharan Africa to be part of the Jomtien Conference held in the year 1990, where nations pledged their commitment to universal primary education. Despite such commitments which shape the country's policy environment, problems in the education sector seem to persist. Also discussed in Chapter 1 is the study's problem statement which addresses the challenges faced in the national education sector, specifically at primary level. In addition, an outline of the overarching research question and the study research objectives was provided.

Chapter 2 addressed the first objective of the study which is 'to describe the relevance of public investment in primary education in promoting development goals. This was achieved by firstly defining the concept of development and gaining a broader understanding of the notion of development from multiple perspectives. Some of the view on development are from an economic growth perspective, a neo-colonial dependence model, a capabilities approach, social and human development perspective, an ecological and an integrated approach to development. Currently, the more prominent viewpoint adopted from international organisations is the integrative approach, which synthesises various viewpoints and is not limited to one line of thought. International commitments that promote an integrated approach such as the MDGs and SDGs were discussed in the chapter.

By extension, despite other contrary views with regards to educational development, it was shown from the various literature findings that education is a means to national development. The benefits of education and the high rates of return accruing from education were further

discussed with case studies of East Asian countries, which seem to have sound policies on education. In measuring this development, various education indicators from internationally recognised institutions were defined. This also formed a basis of comparison with Malawi's national education policy, specifically on primary level education.

Chapter 3 explored the legislative and education policy environment, while addressing the second and third research objectives of the study. A background on education policy within the African context was provided before delving deeper into the history of education policies in Malawi. National legislation and acts of parliament guiding the education system before the period 1994 were discussed, followed by further discussion on policies and legal frameworks after 1994, when free primary education was introduced in Malawi. The primary education policy objectives were presented and assessed in terms of their alignment with SDG 4. It was found that the primary education policy objectives were aligned with the global agenda outlined in SDG 4.

The fourth chapter presented the research design and methodology. Indicators were selected to represent inputs into education, the progress with education as well as the results (outcomes) of the primary education policy. Indicators were informed by international understandings of educational advancement as well as the Malawi education policy. While many potential indicators are available, the study was limited to an analysis of those indicators for which historical data from trusted sources were available in the public domain. The trend analysis is limited to UN, World Bank data, government publications as well as studies completed and published on the Malawi system. A comprehensive analysis of data coupled with other research study findings was provided with the aim of meeting the fourth research objective: 'to review the progress in achievement of the Education Policy results over the implementation period 1994 to 2016'. The findings in this chapter reveal that progress has indeed been made, but many areas are lagging and need further attention and improvement.

The section below will discuss the success and failures of the education policy with regard to SDG 4, followed by recommendations for policy.

5.3 Main research finding – policy success and failures

In evaluating the Malawi primary education policy results, one of the main obstacles is that data used were limited to the data available in the public sphere. Even though data sourced were primarily from reputable organisations such as UNESCO and the World Bank, they were missing values in certain years. This section provides an analysis of the various input,

process/access and output/outcome indicators. Also addressed in the discussion is an assessment on the successes and failures with reference to SDG 4.

5.3.1 Reflections on input indicators

In terms of the input, process and output/outcomes frameworks used for the study, different conclusions may also be drawn with regards to policy success and failures.

Regarding the input indicators (human, financial and education materials), the Malawi education system appears to be faring well in some areas compared to others. The importance of funding to education and the impact funding has on the other areas has already been established. For instance, *Figure 4.3: Education aid and primary enrolment rate* depicts the impact funding or aid has on the enrolment rates. In addition, adequate funding also has a bearing on the human resources employed in the education system as well as the teaching and learning materials. The Malawi primary education system appears to have the right priorities in that investment/funding in primary education is a high priority area. This is seen in the large proportion of funding allocated to primary education level as compared to the other education levels (*Figure 4.5: Government expenditure on education-all levels*).

However, as the years progressed, it can be noted that the rate of government expenditure on primary education has been reduced compared to when the policy was first introduced during the 1990s. The reduction of government expenditure or its increase does have a trickle-down effect on other indicators such as the Pupil Teacher Ratio and repetition rate. The percentage of government expenditure on primary education decreased in the year 1999 to 2000 and the PTR was observed to increase from 63 to 72. A significant decrease in the government expenditure from 52% in 2000 to 34% in 2010 can also be seen from the graph in *Figure 4.5: Government expenditure on education-all levels*. Coincidentally the PTR increased from 1:63 in 2000 to 1:80 in 2010. It can therefore be deduced that as the expenditure increases, adequate resources are available to hire more teachers and vice versa.

Concerning the pupil-teacher ratio and pupil-qualified teacher ratio, it seems that the enrolment growth rate is higher than the rate of teachers recruited. The pupil-teacher ratio has been increasing with time as can be seen from *Figure 4.6: Pupil-Teacher Ratio*. There was a slight improvement in the ratio to 1:70 in the period 2014/15 as can be seen in Table 4.1: Quality indicators - primary as per the NSO 2016 report. A high ratio suggests that the teachers in the primary education system have relatively large numbers of students to attend to. Consequently,

the students have little access to the teachers if there is need for personal assistance. Ultimately, this has a negative bearing on the individual students' performance as inadequate attention is given to the pupils. Due to such factors it can also affect the transition rate to other grades and the repetition rate of the students in the long run.

Similarly, the policy has not fared well with regards to the pupil-qualified teacher ratio. As can be seen in *Figure 4.7: Qualified Teacher-Pupil Ratio*, the ratio is relatively high. Such a high ratio suggests that students have very low access to or contact with qualified or trained teachers to get all the help they need.

The high pupil-teacher and pupil-qualified teacher ratios raises questions about Malawi's national policy objective iii on primary education, which places an emphasis on enhancing quality assurance, and also objective x on capacity development in primary education (see Table 3.2: Comparison of NEP Objectives and SDG4). The high ratios have a negative implication for the individual student performances. In terms of qualification/training, it is certain that more qualified teachers need to be hired and also undergo the necessary training to effectively meet the individual student needs as indicated in SDG target 4c.

In more developed nations statistics reveal student-teacher ratio in primary schools of 20.2, 19.6, 19.8, 10.5, 21.2 and 15.53 in countries such as France, Germany, Japan, Italy, UK and USA respectively (National Center for Education Statistics, n.d.). This essentially reveals the much-needed progress that Malawi still needs to make as a nation.

Concerning teaching and learning materials, based on the previous study findings and *Figure 4.8: Expenditure on books and teaching material*, a low priority has been given to increasing allocation of expenditure on the teaching and learning materials but rather on teacher salaries as presented in *Table 4.2: Public Recurrent Expenditure on Primary Education (MK billion)*. Consequently, low learning outcomes may be the result. In order to avoid this, re-arrangement of priorities within the education system needs to be undertaken.

5.3.2 Reflections on the process indicators

The Malawi primary education system appears to have succeeded to a certain degree with regards to access/process indicators. Enrolment rates have continued to rise since the introduction of the policy on FPE. This suggests that there is great coverage in terms of children accessing primary education in the country. However, issues of gender disparities need to be resolved as there is higher proportion of male students enrolling as compared to female students and no significant changes have occurred in this regard to date (*Figure 4.10: Primary education*

enrolment by gender). These findings seem to fall short of SDG 4 and Malawi's National Education Policy goals of ensuring gender parity and access to education for all Malawians.

Even though SDG target 4.5 in *Table 3.2: Comparison of NEP Objectives and SDG4* emphasises the elimination of gender disparities, it is observed that more boys enrol in primary schools than girls do. The National Education Policy objective viii also emphasises increasing girls' equitable access to primary education. The negative trend of more boys enrolling than girls continues over time despite the introduction of the policy of free primary education. *Figure 4.10: Primary education enrolment by gender*, shows that the gender gap in enrolment seems to be widening as the years progress. It is therefore certain that there is a gap in terms of addressing this policy area in Malawi.

For years, countries worldwide have put a great deal of emphasis on increasing enrolment or the number of children accessing school, while overlooking the product and end results of that access (Kenny, 2014). For instance, despite an increase in enrolment rates, low levels of resources mean that schools are operating in poor learning conditions and as a result there are low levels of pupil achievement and little learning taking place (Chimombo, 2009:309). Governments need to ensure that the students are indeed learning and acquiring useful skills from the education provided.

Regarding the transition rate, *Figure 4.11: Transition rate primary to lower secondary* provides a vivid picture. The policy has yet to achieve a 100% target with regard to student's transition to lower secondary. The rate has not been consistent but has ranged over time from a rate of 82% to 91%. The high rates indicate that there is a high level of access from the primary level of education to the secondary level.

According to UNESCO (2018), "the repetition rate ideally should approach zero percent". Given the trend depicted in *Figure 4.12: Primary Repetition Rate*, the repetition rate has made little progress over time. Despite the reduction of the repetition rate in 1994, when the FPE policy was introduced, in the year following the repetition increased by 1.39%. In the years following (1996-1999) the repetition rate declined; this may be attributed to more resources being pumped into the primary education sector at the time. With reference to *Figure 4.12: Primary Repetition Rate* and *Figure 4.5: Government expenditure on education-all levels*, the percentage of government expenditure on education appears to have an effect on the repetition rate. During 1995 government expenditure on education was relatively higher compared to the previous years before FPE was introduced, and it continued to increase until 1999.

Correspondingly, it can be observed that the repetition rate decreased from 1995 to 1999. This may be due to the availability of adequate resources to meet the majority of the students' needs. From 2000 the government expenditure on primary education was reduced and we observe that in the same year the repetition rate begins to also rise. This may not be a mere coincidence; it can therefore be deduced that the more funding or government expenditure on primary education, the more the resources to meet the students' learning needs and hence lower repetition rates. As the years' progress, a similar trend continues. As observed during the period 2011-2013 with increased government expenditure from 34% to 49% on the primary education level, the repetition rate during the same time period declines from 19% to 18%. It is certain that when the percentage of government expenditure on primary education is high, the repetition rate decreases. This may be due to adequate resources to ensure good learning outcomes and the progression of students to the next level.

5.3.3 Reflections on the result indicators

It is important to note that the inputs and process indicators have an impact on the results achieved. With regards to output/outcome indicators, the completion rates in primary school education have increased since the introduction of the policy though at a decreasing rate. Patterns of gender inequality can also be observed, as the male completion rate is higher than for the female students as indicated in *Figure 4.13: Primary completion rate*.

SDG 4 Target 4.1 aims "to ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes" (UNESCO, 2016:8). Based on this target area, we observe from *Figure 4.13: Primary completion rate* that with regards to the primary level completion rate, the nation experienced a steady increase from 1994 to 2002, and then from 2002-2007 the completion rate declined but peaked again in 2008 with a steady increase to date. In comparison to the period before 1994, the country has succeeded in making it possible to increase the number of pupils completing primary education. It can therefore be said that the government of Malawi has succeeded to a certain extent.

SDG target 4.5 aims at eliminating gender disparities in education; however, it has been observed that Malawi as a nation has yet to meet this target. In *Figure 4.13: Primary completion rate*, the number of male students who complete primary education is relatively higher compared to the female students. The same issue of gender inequality is depicted in the enrolments in primary education as earlier indicated in the *Reflections on input indicators*

(Figure 4.10: Primary education enrolment by gender). This is also in contrast to the NEP objective viii, which aims at increasing equitable access, participation and completion of primary education.

The next component of the outcome indicators that is crucial to this study and responds to the study research objective – “*To assess the level of education amongst the citizens of Malawi*” – is that of the literacy rate. SDG target 4.6 aims at ensuring that a significant proportion of the youth attain literacy and numeracy. With reference to *Table 4.3: Literacy Rate*, the literacy rate has improved over the years, though not consistently. Currently, the literacy rate has dropped in the recent years to 62 percent for the population above the age of 15. The disparities in literacy rates between the male and female population have been reduced as the year’s progress. Nevertheless, improvements still need to be done in order to achieve equality. A high or low literacy rate provides an indication of the effectiveness of the primary education system (UNESCO, 2018). The low literacy rate in Malawi therefore raises questions about the effectiveness of the primary education system.

In comparing the literacy rates with Asian countries which seem to have fared well in their primary education system, it can be observed that their literacy rates are high. According to a report by UNESCO (2017), in southern Asia the adult literacy rate increased from 46% in 1990 to 72% in 2016, while in Eastern and South Eastern Asia it rose from 64% to 81% in 1990 to 2016 respectively. The youth literacy rate in Southern Asia increased from 59% in 1990 to 89% in 2016, while in Western Asia it rose from 80% to 90%. This is relatively higher in comparison to most sub-Saharan African countries and Malawi, which had a literacy rate of 62.14% in 2016.

In essence, the Malawi education policy is working though not fully effective. As can be observed, the input, process/access and output/outcome indicators are interconnected and have an effect on the entire education system. Access to the education system seems to be consistently on the rise, and consequently more resources are required to meet the needs of the students. However, if the school system has inadequate resources, negative outcomes are more likely to occur. One of the main areas of concern identified so far is the funding and challenges in the successful implementation of the policy.

5.4 Policy recommendations

This section makes recommendations for the primary education policy on the three aspects discussed: input/access, process and result indicators.

Recommendations responding to the input indicators

In terms of finance allocation, the need for adequate funding has already been established. Based on the observed trend on the effect that the percentage of government expenditure on primary education has on other indicators such as PTR and repetition rate, there is a need to increase the percentage of government expenditure on primary education as the years progress. This implies that more teachers may be hired, and more resources made available to enable good learning outcomes and progression to the next level. There is also a need for a clear division of resources between the primary and tertiary education levels. An increase in percentage of expenditure on teaching and learning materials as well as conducting more teacher training should also be considered.

In order for the government of Malawi to meet the primary education policy objective iii on adhering to quality assurance, hiring more qualified teachers and conducting training courses may be a means through which this can be achieved.

Recommendations responding to the process/access indicators

The policy has fared well in terms of increasing access to primary education as can be seen from the overall enrolment figures which continue to rise. Despite being a priority area for most development organisations, SDG target 4.5 and the National Education Policy objective viii, the gender gap in education persists. The gender gap can be traced all throughout the input, process and output/outcome indicators. Even there may be multiple reasons for the gender gap, a number of studies make suggestions on the possible ways to overcome this gap in the education system (Hausmann & Viarengo, n.d.; Karam, 2013; Unterhalter, North, Arnot, Lloyd, Moletsane, Murphy-Graham, Parkes & Saito, 2014; Wodon, 2014). Malawi can therefore learn from these studies on proven best practices and implement them within the country context.

A recent study conducted by UNESCO found that if the necessary resources are provided, poor families gain an interest in educating their children, more particularly girls (Unterhalter, North, Arnot, Lloyd, Moletsane, Murphy-Graham, Parkes & Saito, 2014:54). Therefore, if resources can be channelled through a careful selection system to the required families, schools may be

made more accessible to girls. The resources should be sufficient to ensure successful completion of primary education into secondary education.

In addition, an intervention to reduce the gender gap would be infrastructure development. This can be achieved by building more schools in communities, especially in rural areas (Wodon, 2014). This will eliminate the barrier of long distances to get to schools. Having well trained teachers is reported to also have a positive effect on girls' schooling and performance (Unterhalter *et al.*, 2014:15). Ultimately, Malawi needs to conduct a thorough evaluation of primary education policy, after which an education system reform needs to be undertaken to incorporate interventions that reduce the gender gap.

With regards to meeting the needs of all students enrolled, improving the transition rate and reducing the repetition rate, and investing more finances in the primary education system are necessary and already of proven value. There will be need to hire more qualified teachers, building of more infrastructure or learning facilities, and providing study materials that may assist the students to progress.

Ultimately there is great need for monitoring the implementation process to ensure that best results are achieved. This can be achieved by implementing an effective system of monitoring and ensuring accountability. Given the resource constraints, devising cost-effective strategies to advance the quality of primary education in the schools could be considered.

Recommendations responding to the outcome indicators

A 100% completion rate of the primary education level has yet to be achieved. Patterns of inequality based on our data analysis can also be found. There may be many reasons as to why the completion rate is not yet 100%. In a nutshell, the input and process indicators have a bearing on the outcomes such as completion. As previously stated, there should be an increase in the number of teachers who are qualified and more funding should be allocated to the primary education system. As a result, the system may become more efficient and effective, leading to improved results (completion rate).

Various factors may contribute to a low or high completion rate. This may include but not limited to citizen commitment to education, poverty levels in the country, access to education in rural settings, social cultural factors, a child's gender in certain contexts, peer influence and income level of parents among many other factors. However, this study does not track these factors that may also influence results in the long run. As such there is need for further studies

and investigation. In addition, it is important to note that an education policy cannot be implemented in isolation but rather there is need for an integrated and holistic social and economic response.

Concerning the literacy rate as an outcome indicator, this provides a picture of the state of development in the country. The lower literacy rate of 62.14% in 2015, with the rate for men at 69.75 and for women at 55.2%, provides an indication of the much needed work in the education system. The policy on education should therefore be revisited and adapted. The concerted effort should not only be on improving access, but also adequate financing and resource allocation to ensure that resources and activities are effectively implemented.

5.5 Concluding remarks

In evaluating the effectiveness of Malawi's primary education policy, it can be observed that the policy is working to a certain degree but requires further attention in the implementation process. This chapter addressed the study research objective, which aimed at assessing the success and failures of the Malawi education policy results in terms of the SDG 4. This is based on the analysis of the selected indicators of the study and the notable gap that exists in the implementation process of the policy. Effectiveness was measured using international agenda SDG 4 indicators/target areas and comparing them with Malawi's national education policy with a specific focus on the primary education level. Based on an analysis of the selected indicators, it is evident that resources have indeed been allocated, though they are not adequate enough to meet all pupils' needs. There is a need for greater financial allocation, an increase in the teacher numbers and training, as well as a need for monitoring the implementation process more systematically.

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