



*an identification and analysis of*

**THE SOCIO – ECONOMIC CHALLENGES CHILDREN  
FROM RURAL AREAS FACE IN THE PRE – UNIVER-  
SITY CYCLE IN THE MOCUBA DISTRICT, ZAMBÉZIA  
PROVINCE, MOZAMBIQUE.**

**Aukje Ter Horst** TRHAUK001

A minor dissertation submitted in partial fulfilment of the requirements for the award of  
the degree of Masters in Education (Educational Administration, Planning and Social Policy)

SUPERVISOR: PROF. CRAIN SOUDIEN  
FACULTY OF HUMANITIES  
UNIVERSITY OF CAPE TOWN

2011

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## ABSTRACT

The weak performing Mozambican education system has gone through significant changes since independence in 1975. The Government's main focus has been on increasing access and equity to overcome the high dropout rates, high grade repetition, high pupil-teacher ratios and the low number of qualified teachers. Despite this focus, access remains a large problem for the people of Mozambique. It is particularly so, as this interpretive case study research revealed, for learners from rural areas.

The primary purpose of this research, therefore, was to outline the challenges learners from rural areas face in accessing what has been described as the ESG2 (Escola Secundária geral do Segunda Grãu) cycle. This research focussed on a specific school within the Zambézia province.

The data for this study was gathered using a questionnaire, which contained close-ended and open-ended questions. Semi-structured interviews were also held with a target group of learners from rural areas.

This research brought to light, firstly, the lack of available educational institutions throughout the province. It also showed that the main challenges the target group of this research faced in this respect were economically related. Underdevelopment of Mozambique and its citizens also plays a fundamental part in these challenges and also in the learners every day life experience and their initiatives to develop their human capital.

Besides these economic challenges, the research also revealed that students face a variety of other difficulties when accessing the ESG2 cycle. These challenges have a major impact on the educational development and the future of learners at Mozambican schools today.

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Special gratitude goes to my family. Thanks for helping me make my dream come true!

Lastly I would like to dedicate this dissertation to my best friend, my 'oma' who always loved hearing about my adventures and studies whilst living in Africa.

## DECLARATION

I, Aukje Ter Horst, hereby declare that this work has not been previously submitted in whole, or in part, for the award of any degree. All sources I have used or quoted have been cited and referenced.

Signature:

Date:

Aukje Ter Horst

June 2011

## ACRONYMS

ADPESE	Danish Support to Education Sector Strategic Plan
AIDS	Acquired Immune Deficiency Syndrome
DANIDA	Danish International Development Agency
DPE	Direcção Provincial de Educação/ Provincial Education Department
EFA	Education for All
EP1	Escola Primária do Primeiro Grãu
EP2	Escola Primária do Segunda Grãu
EPPS	Education Policy Simulation Model
ESG1	Escola Secundária geral do Primeiro Grãu
ESG2	Escola Secundária geral do Segunda Grãu
ESSPI	Education Sector Strategic Plan I
ESSP II	Education Sector Strategic Plan II
EU	European Union
HIV	Human Immunodeficiency Virus
ILO	International Labour Organisation
IMF	International Monetary Fund
IWGE	International Working Group on Education
MDG	Millennium Development Goals
MEPT	Mozambican Education for All Movement
METS	Medium Term Expenditure Scenario
MINED	Ministry of Education
NEP	National Education Policy
OBE	Outcomes Based Education
PRSP	Poverty Reduction Strategy Paper
SAP	Structural Adjustment Programme
SNE	National Education System
UNESCO	United Nations Educational Scientific and Cultural Organisation
WTO	World Trade Organisation

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*chapter one*

## INTRODUCTION

*chapter two*

## LITERATURE REVIEW

*chapter three*

## **RESEARCH DESIGN AND METHODOLOGY**

*chapter four*

## **PRESENTATION AND DISCUSSION OF FINDINGS**

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## **CONCLUSION**

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# CHAPTER ONE

## INTRODUCTION

The Republic of Mozambique is one of the poorest and underdeveloped countries in the world. It is located in the south-eastern part of Africa and is divided into eleven provinces; Cabo Delgado, Niassa, Nampula, Tete, Zambézia, Manica, Sofala, Inhambane, Gaza, Maputo Província and Maputo Cidade (the capital of the country). It covers an area of almost 800 000 square kilometres. Mozambique has a total population of 20 971 446 of which 65,5 percent lives in rural areas (UNESCO; 2009).

From the 15<sup>th</sup> century to 1975, when it attained political independence after years at war, the Republic was a Portuguese colony. During the early 1980s Mozambique experienced another war, this time a civil war. The civil war continued till 1992 and left the country in destruction, however since then Mozambique 'has undergone rapid socio-economic growth' (SACMEQ, 2009).

The official language in Mozambique is Portuguese which is only spoken by 30 percent of the population (SACMEQ, 2009). Besides Portuguese 18 indigenous languages are spoken, some in various dialects. As of Grade I Portuguese is the language of instruction.

While working as a voluntary teacher in the Mozambican secondary education sector, I became very aware of the problems it faces. Through conversations with learners at the school where I worked, and listening to my colleagues' anecdotes about their experiences, it became clear that many learners in the secondary education sector are facing more issues than just attending school. This applies specifically to the learners who originate from other districts, mainly rural, outside that in which the school is based. Through this experience, I became more interested in gaining additional knowledge about the equality of access to secondary education for students, focusing on learners from the rural districts.

## 1.1 The Mozambican Education System

The national education system, at an administrative level, operates at four systemic levels: the National Education Department, the Provincial Education Departments (DPE), the District Education Departments (DDE), and all institutions that provide education (including schools).

The Ministry of Education (MINDED) is responsible for all the national strategies, plans and budgets, and distributing funds and resources at a provincial level. In the provinces the DPE is responsible for spreading resources amongst the education institutions. Funds allocated by the DPE and the administration fall under the responsibility of the DDE (Bilale: 2007).

Formal Education in Mozambique is divided into two levels - primary and secondary (Handa *et al*, 2004). The formal education system includes the following sub-levels: pre-primary, primary, secondary, technical, adult and higher education, the latter being under the administration of the Ministry of Higher Education, Science and Technology (UNESCO, 2000; UNESCO, 2006: 13). The Mozambican education system mainly comprises of public schools. However, since 1990, the year that the Government encouraged the opening of different schools, various private and community schools have been established (UNESCO, 2006).

Pre-primary education can be voluntarily attended by children under the age of six years and is known as nursery school. Primary education is officially for children from the ages of six to approximately 12 years of age. It covers seven years and is divided into two cycles. The first cycle is EP1 (Escola Primária do Primeiro Grãu) which includes Grades One to Five, followed by the second cycle, EP2 (Escola Primária do Segundo Grãu) which includes Grades Six and Seven.

As in the primary cycle, the secondary cycle is also divided into two cycles. The first cycle is ESG1 (Escola Secundária Geral do Primeiro Grãu) and includes Grades Eight to Ten. The second cycle, ESG2 (Escola Secundária Geral do Segundo Grãu), includes Levels 11 and 12, and is referred to as the Pre-University Level. This last cycle is only taught at a limited number of schools (63 schools (MINED, 2004: 52)), across the country. For each of the Grades in ESG2, the learners can choose between three different cycles. Firstly, the A cycle, which covers the subjects Portuguese, English, French, History, Geography and Mathematics. The second cycle, B, covers Portuguese, English, Chemistry, Physics, Mathematics and Biology. The third cycle, C, covers Portuguese, English, Chemistry, Physics, Mathematics and Art.

Technical and Vocational education is divided into three levels: Elementary, Basic and Middle levels, which are similar to EP2, ESG1 and ESG2. Literacy and Adult Education is available for those who are not of the normal age to attend general or technical and professional education at institutions (UNESCO, 2006). Entrance into higher educational institutions is based on the grades earned in ESG2 and upon the students' age.

Since the end of the civil war in 1992, the Mozambican Government has made several policy and curriculum changes in the secondary education sector. These changes were not only specifically directed towards the improvement of educational quality, but also at improving the access to secondary education across the country. This should, according to the Government, result in achieving Education for All (EFA) by 2015, which is part of the Millennium Development Goals (MDGs).

Despite all efforts made thus far, I found that there are still many problems that need to be resolved before EFA can be achieved, particularly so in the secondary education sector. These problems relate mainly to quality and access.

Across Mozambique, there are more than twice as many ESG1 as opposed to ESG2 schools. One of the provinces where this is not the case is the Zambézia province, where in 2006 there were 29 ESG1 schools and only three ESG2 schools. Because of this difference, and quality and access-related problems, and also my previous employment in the Zambézia province, I decided to look at access to ESG2 schools in this province, focusing on one school in particular for this study.

This study sought to draw statistical data from the various educational departments in the province, with the aim of looking at the educational development within the province. This study further drew its data from the participants within the ESG2 schools in the Zambézia province. It aimed to investigate the challenges that the participants from the rural districts faced whilst they were trying to gain access to the ESG2 school, and the challenges they faced once they had gained access.

## **1.2 Context of my research**

Modern underdevelopment is generally viewed as a process which commenced after the beginning of the process of decolonisation (Labini, 2001), and was caused by the problematic economic relations between the developed and underdeveloped countries (Chew & Denmark, 1996; Labini, 2001). The

post colonial period in Africa has been characterised by dramatic turbulence and social change. These developments, according to Abagi (cited in Abdi & Cleghorn, 2005: 299), include "... the alteration in patterns of social structure, social institutions, social processes, and human behaviour and interaction overtime". While this view is important, it is more accurate to say that the changes began with the forced adaptations to indigenous ways of life that slavery and colonisation demanded and continued into the post-colonial and independence periods (Abagi as cited in Abdi & Cleghorn, 2005: 300).

The changes also affected processes of education on the African continent. First of all, one saw the annihilation of indigenous approaches to education. Secondly, as a result of colonisation, one saw the installation of degraded systems of education. Crossley and Tikly (as cited in Nguyen et al, 2011: 110) say that "the vast majority of education systems that are examined by scholars have their origins in the colonial era." Furthermore the relation between these systems and the society has been outlined as follows by Abagi (as cited in Abdi & Cleghorn, 2005: 299): "Indigenous African education was intimately intertwined with social life, and its curriculum was closely related to the social context in which children, youth and adults are called to live." Tikly (2001: 169) adds that educational change in Africa has been profoundly shaped by global forces both in contemporary and modern periods. The historical effects of these experiences across the continent have led to the underdevelopment of many of its education systems. There are many dimensions to the character of this educational underdevelopment. These include poor resourcing, under-qualified personnel, and critically, for the purposes of this study, an inability to provide access. The Mozambican context is a clear example of this historical experience - particularly so with respect to the question of access.

According to Klees *et al* (1997) this problem is caused by a variety of factors relating to inequality within the Mozambican education setting. This view is supported by UNESCO (2006) which argues that the various layers of the Mozambican education system are in need of reform. These views have challenged the Mozambican Government to seriously look at each layer of the education system in depth, and to adapt and implement reforms to establish a better and thus more accessible system as a whole.

The implementation of various educational reform programmes has been challenging for the Mozambican Government. These implementations have been least successful for the learners who live in the rural districts. These learners are disadvantaged, specifically when it comes to access to certain levels of education as a result of economic underdevelopment. It is commonly known that learners from

rural districts lack educational development, especially in comparison to the learners from urban districts (UNESCO, 2002: 72).

Despite the efforts for improvement, learners from rural districts still face more challenges than learners from urban districts when trying to gain access to certain levels of the Mozambican Education system. One of the levels that has many access-related issues is the ESG2 level which prepares learners for university. In comparison to the ESG1 schools, the ESG2 schools are limited in number, and it is consequently harder to gain access to one of these schools. Many learners from the rural districts view the ability to gain access to ESG2 schools as an almost insuperable difficulty. The discussion below provides a stronger background to the issues.

### **1.3 Background to the Problem**

Mozambique was one of the last sub-Saharan countries to gain independence from her Portuguese colonisers. This was in 1975. Moreover, the country had the misfortune to be colonised by one of Europe's poorest empires, Portugal (Cooper, 2002), and as Jarrett (1996: 12-13) explains, the Portuguese "served to paralyse African traditional Government, culture and religion". Jarrett (1996: 12) continues that the Portuguese forced their colonies to settle disputes according to Portuguese policies, without taking traditional practices into consideration.

The Portuguese left behind an education system full of distortions which led to a ninety percent illiteracy rate amongst the population aged seven years and older (UNESCO, 2006; UNESCO, 2000). Klees *et al* (1997) describe the pre-independence educational system as not being very developed and characterised by its discriminatory nature. The objectives of the Portuguese education system implemented in Mozambique were, according to Mondlane (1969, as cited in Klees *et al*, 1997: 18), twofold: "a) to produce relatively few Mozambicans who would act as intermediaries between the colonial power and the population, and b) to inculcate an attitude of servility in the educated Mozambican."

Mondlane (1969, as cited in Klees *et al*, 1997: 18) continues to argue that the Portuguese education system reflected little or nothing in the way of Mozambican content and was inadequate in relation to the needs of both individual and society.

After independence, the Mozambican Government devoted significant efforts to reduce the high level of illiteracy and to redress inequities in the system (Klees *et al*, 1997; UNESCO, 2006; UNESCO, 2000): “From 1975 to 1979 primary education and literacy programs were successfully extended across the country” (UNESCO, 2006: 10). Despite the start of a civil war that spread to ninety percent of the country (UNESCO, 2006), the enrolment rates in primary education and secondary education increased drastically, which respectively duplicated and tripled (UNESCO, 2000). This tremendous increase was established by the expansion of the notion of free education for all. This period in Mozambican education history is also referred to as the schooling explosion. However, this increase was first of all seriously damaged by the civil war (Klees *et al*, 1997), and secondly, various problems occurred which affected the quality of teaching, such as an expansion in class sizes, and the lack of sufficient classrooms and school buildings (UNESCO, 2000). Even though these problems are now very clear, statistics showed that in the first decade after independence, more Mozambicans attended school than during the Portuguese colonial period (United States Agency for International Development, 1992).

In 1983, in an attempt to overcome the problems that occurred as a result of the schooling explosion, the Ministry of Education (MINED) decided to reorganise the school network, which resulted in the establishment of the National Education System (SNE) (UNESCO, 2006). One of SNE’s main goals was to control the schooling explosion and to solve the problems caused by it. The MINED aimed to do this by reforming the curriculum and education system following basic objectives; which were to expand access, to improve the quality of education, to improve its’ efficiency and to reduce the costs of the overall education strategy. Simultaneously, the MINED underlined important issues dealing with one of these basic objectives, namely the expansion of access. The MINED emphasised that the expansion of access should be achieved by “paying particular attention to the promotion of social equity, equity between the regions, the cities and the rural areas, and on the basis of gender” ([www.ilo.org](http://www.ilo.org)).

Despite the introduction of the SED, the MINED was held back in its attempts to further improve the national education system. In 1983, approximately six years into the civil war, it was estimated that half the available schools were destroyed (UNESCO in Roby *et al*, 2009: 343), were used for political purposes or were not able to operate due to the extremely difficult conditions in the country (Klees *et al*, 1997; UNESCO, 2000). Consequently, national repetition and drop-out rates increased drastically. School-going children either migrated with their families to safer places in the country or to foreign countries, or the fighting parties took them out of school to join the army. Another huge impact on repetition and drop-out rates was the destruction of schools and the limited resources with which to open new schools to replace those that had been destroyed. In addition, those teachers still trying to make it possible for children to attend school were also seriously affected by the war. They were often

left with inadequate support from the various educational departments across the country, such as the national, provincial or local education authorities. Despite this, the enrolment rates in primary education remained quite stable during the first years of the civil war (UNESCO, 2006). Another reason for the increase in the repetition and drop-out rates was the adoption of Portuguese as the medium of instruction throughout the country, which was deemed to have had enormous consequences as at the time, only 1 to 2 percent of the population used Portuguese as their mother tongue (UNESCO, 2000).

In 1985, the implemented literacy campaigns came to bear fruit with statistics showing that illiteracy had been reduced from 93 percent in 1975 to 70 percent (Klees *et al*, 1997). This was achieved despite the destruction of 58 percent of the school network during the civil war.

Up until 1987, enrolment into primary education had been free of charge, but as a consequence of the implementation of Structural Adjustment Programmes (SAPs<sup>1</sup>) from the World Bank, which resulted in the reduction of budget allocation, parents were forced to contribute towards school expenses (Klees *et al*, 1997; UNESCO, 2000). The parents and the school decided upon the size of these contributions based on what a school needed in order to function properly as an educational institution (UNESCO, 2006). Fauvet (2000) adds to this when he/she found that defence spending during the civil war had become the largest recurrent expenditure in the annual budget, resulting in minimal funds being allocated to the social sectors, including education. With the implementation of SAPs, the annual budget for education was further decreased. Fauvet (2000: 16) continues that it was only after the elections in 1994 that the social sector was allocated an increase in its budgets. These elections were held two years after The General Peace Agreement ending the civil war was signed.

After the budget increase and the end of the civil war, the Government approved the National Education Policy (NEP) (UNESCO, 2006). This policy outlined three main lines of action that needed to be undertaken in order to establish a more adequate education system. These three lines of action were not new to the government and were identified as the “expansion of access and equity, the improvement of the quality and relevance of education as well as strengthening institutional capacity” (UNESCO, 2006: 11). The NEP aimed at educating the Mozambican citizens by giving priority to basic education, in collaboration with the three main lines of action in the new policy (UNESCO, 2006: 11). In 1998, the education sector was allocated a larger budget due to the cut in the military budget. A year later, the education sector was allocated further funds due to increases in both capital and recurrent

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<sup>1</sup> Structural Adjustments Programmes (SAPs) were introduced and implemented by the World Bank and the

allocations (Fauvet, 2000: 16). This second budget increase led to the recovery from the damage inflicted during the civil war in the primary education sector (Klees *et al*, 1997; Fauvet, 2000). Notwithstanding, the problems of limited access and low quality remained (Klees *et al*, 1997: 18).

As a result of the remaining problems in the education sector, the introduction of the NEP was followed by the first ever written Education Sector Strategic Plan (ESSP I) 1999-2003, which reiterated the objectives and priorities of the NEP. Its main aim was to improve the education system and therefore provide better and more equitable access to education. The focus of this aim was on poverty reduction and the promotion of economic and social development (UNESCO, 2006), (UNESCO, 2000).

In the meantime, the Government set priorities for a new five year period (2001-2005), which focused (even more than the ESSP I) on the improvement of the quality and the expansion of access (Republic of Mozambique, 2005: 6). After this period, the effort again continued to be concentrated on the expansion of access and the improvement of the quality of education (Republic of Mozambique Brussels Action Plan, 2005: 7). To achieve this, low cost schools were constructed, aimed at expanding access to the provinces of Zambézia, Cabo Delgado, Nampula and Tete. Through all these efforts, a clear increase has occurred in the enrolment rates at both primary and secondary level. In primary education, the enrolment rates have grown between 17.9 percent and 25 percent, whereas the increase in secondary education enrolment is 10.6 percent. (Republic of Mozambique, 2005: 7 & 8). The results of ESSP I were taken into consideration when developing ESSP II.

The second Education Sector Strategic Plan (ESSP II) 2005-2009, echoes the Government's aim to increase access, to improve quality in basic education and to provide a coherent and efficient education management system (UNESCO, 2006). The experiences learned during the implementation of ESSP I were used to establish a better and more strategic ESSP II. This plan articulates with various other initiatives, such as the Millennium Development Goals (MDGs), the Poverty Reduction Strategy Paper 2001-2005 (PRSP), the Medium Term Expenditure Scenario (METS) and the Education for All/ Fast-Track Initiative (UNESCO, 2006). Just as in ESSP I through the objectives of NEP, ESSP II focuses on basic education with its highest priority being on primary education. UNESCO (2006: 12 & 13) further outlines that ESSP II as a sector strategy: "encompasses and inter-links a consistent framework in the following components: basic education, secondary education, teacher training, cross - cutting issues, enhancements to education and management of education".

Despite all these efforts to improve the education sector, this sector can still be described as being of low quality, reflected in high repetition and drop-out rates (Klees *et al*, 1997: 19; Fauvet, 2000: 16). This is not only as a result of the low quality of education, but also the learning environment - large class sizes in short supply of resources, and insufficient classrooms and school buildings. As described by Fauvet (2000: 15) the former Finance Minister reflects on this poor access to education by saying that a rural Mozambican must walk an average of 66 kilometres to the nearest secondary school. In addition, Mozambique is still struggling to solve its chronic qualified teacher shortage which has a major impact on the improvement of the education sector. Specifically in the rural areas this is a large problem as is confirmed by UNESCO (2010: 7) “the poorest regions and most disadvantaged schools have the fewest and least-qualified teachers”.

To show that it is indeed hard, but not impossible, for rural learners to gain access to the ESG2 schools, I have used the above-described background for this study in order to achieve the following goals:

#### **1.4 Goals**

The goals for this study are as follows:

- to identify the socio-economic challenges learners from rural districts face when accessing Grade 11, the first grade of the Pre-University level of secondary education.
- to gain a better understanding of the Mozambican education system with respect to access.
- to establish what significance underdevelopment holds for access to education for learners from rural districts in Mozambique.

#### **1.5 Methodology**

This research is an interpretive case study. This particular methodology is most appropriate for this research as I wanted to obtain a better understanding of the participants' interpretations of the real

educational situation in the natural context. Cohen *et al* (2001: 181) argue that the most suited approach for case study research is an approach “with (an) emphasis on the interpretive and subjective dimensions of research.”

According to Feinberg & Soltis (1992: 75-76), an interpretive approach gives a clear description of what is going on in particular instances of schooling. An interpretive approach is not concerned with the general rules, but with the settings in which individuals (or small groups) are involved (Janse van Rensburg, 2001: 16). Cohen *et al* (2001: 22) add that the interpretive approach enables the researcher, and later the reader, to understand the subjective world of human experience.

A case study provides the reader with a better understanding of “real people in real situations” (Cohen *et al*, 2001: 181). According to Adelman (1980, cited in Cohen *et al*, 2001: 184), case study research brings several advantages, one of them being the presentation of the data, which is more publicly accessible than other kinds of research reports.

## **1.6 Structure of minor dissertation**

Chapter Two represents the literature review based on African and international literature on education and underdevelopment. It outlines the notion of underdevelopment from different periods of time and perspectives. It discusses in more detail the development of education and the influence of underdevelopment on different problems within the education sector and *visa versa*. It further discusses the notion of Education for All in relation to social disparities and access to education.

Chapter Three presents the research design and the research methodology which was used as a guide to perform this research.

Chapter Four is used to present and discuss the findings and data collected throughout this research. It also provided a description of the demographic background of the participants involved in this research.

Chapter Five is dedicated to a conclusive summary of the main findings, possible recommendations for the Zambézia Provincial Education Department concerning access to ESG2 schools, and it considers the limitations of this research.

## CHAPTER TWO

### LITERATURE REVIEW

Of all the public socio-cultural institutions in society, education is undoubtedly the most important (Jarret, 1996). Education provides the opportunity for a human being to develop and strengthen his/her own personality, his/her skills and his/her knowledge in specific areas. It is a process which involves teaching and learning in an educational environment (school, college, university, etc.). "Having the opportunity for a meaningful education is a basic human right. It is also a condition for advancing social justice" (EfA, 2010: 8). Everybody should have access to education, even if it is only of a basic standard. It not only provides the foundation for communication, learning, creativity and technological advancement, but it is also a major factor in personality development and behaviour (Jarret, 1996). Furthermore, education has the capacity to enhance the quality of life and provide better opportunities for individuals in their future. However, in developing countries, the various layers of the education sector are not easily accessible for everybody with the right to education. One of the main factors causing this is underdevelopment. The purpose of this chapter is to understand the significance of underdevelopment as it is presented in international literature and to consider its implications for the development of education.

#### **2.1 Underdevelopment**

The term underdevelopment was first used as a geographical term. Its author, Truman (1949), used the idea to refer to what he called the "underdeveloped regions" (Truman, 1949) - developing countries in which economic developments had to be devised and controlled to assist these underdeveloped regions in their development. Underdevelopment is a concept that is strongly related to a nations' economy, and is therefore often referred to as economic underdevelopment, and is caused in some ways by the lack of physical capital (Takii, 1997).

Several theorists outline the link between underdevelopment and the economic stagnation of countries so described. Leys (1996: 51) argues that underdevelopment is "being appropriated more by the ideologists of international capital than by the workers and peasants of the Third World". Ashcraft

(1973: 1) refers to situations of underdevelopment as “the extreme poverty and economic stagnation of non-Western countries”, and he continues by addressing the socio-economic malaise caused by functioning in a state of economic stagnation, which again causes widespread poverty, financial dependence, many social and political ills, limited access to public (social) services and rapid population increases. In this context, Leys (1978: 7) refers to underdevelopment as “the failure of the countries of Asia, Africa and Latin America to follow a path of autonomous capitalist development, leading to their ‘degeneration’”. Due to this link between underdevelopment and the fragile economic situations (Ashcraft, 1973; Takii, 1997) of developing nations, underdevelopment will, in this literature review, further be addressed as economic underdevelopment.

Economic underdevelopment can be argued to be the cause of various past and present problems in African and other poor countries everywhere in the world. Colonialism and imperialism played an important part in giving underdevelopment shape and character (Geo-JaJa, 1999). According to Leys (1978: 8), economic underdevelopment started when the Third World “began to be progressively incorporated into a permanent relationship with the expanding capitalist economy”. At the heart of this approach is the economic relationship between developed (metropolitan) countries and underdeveloped (satellite) countries. In terms of this, a basic asymmetry is evident as the balance of forces in trade and politics favour the developed countries in so far as they have come to either own and/or manage the greater part of the world’s resources at the expense of the poor countries (Frank, 1966: 18).

This approach has been developed theoretically with commentators such as Geo-JaJa (1999) who argues that the underdeveloped countries are being deliberately held “ransom” so that developed nations can take advantage of them. Rodney (1981) supports this by arguing that the global power and the superior position of the rich and developed countries remained so by blocking or deforming any effort of development by the underdeveloped countries. In a similar way, Bacchus (1980: 17) agrees, suggesting that the objective of economic underdevelopment is to block the development of an economically viable developing country. Labini (2001: 6) adds that many of the underdeveloped countries are poor because they have been cheated of important shares of their resources, “which can be seen as the exploitation by the stronger” (Leys, 1978: 7). The process, according to these authors, has made it almost impossible for the underdeveloped countries to move away from the “economic underdevelopment” status they have been given as a result of the global power of the developed countries. Ashcroft (1973: 5 & 6) adds to this by saying that whatever efforts the underdeveloped

countries make to move away from this situation, they always “face the competitive advantages of the developed countries”.

### **2.1.1 Economic Underdevelopment from an African perspective.**

As stated above, colonialism is one of the main factors in the recent economic underdevelopment in Africa (Anamuah-Mensah, 2000; Bacchus, 1980; Lindsey, 1975; Mungazi, 1982). Economic underdevelopment in Africa was left as a legacy by the colonisers and characterised by poverty, malnutrition, disease, low life expectancy, illiteracy and growing squalid conditions (Anamuah-Mensah, 2000), and thus reduced living standards (Cheru, 2000: 9).

The argument can be made that the majority of people in African countries were denied opportunities to develop, and one of the only means of employment at the time was that offered by the Europeans. Jarrett (1996: 9) describes the colonial period as the “destruction of Africa’s traditional political, commercial, educational, agricultural, and religious institutions, and the annihilation of the old African society”. Rodney (1982: 13) continues to say that “underdevelopment makes sense only as a means of comparing levels. It is very much tied to the fact that human social development has been uneven and from a strictly economic viewpoint, some human groups have advanced further by producing more and becoming more wealthy.”

Cooper (2002: 4 & 5) explains that after independence, the new states effectively had to deal with a failed colonial development landscape. The new African Governments inherited single-commodity economies, limited markets, ponderous administrative systems and a lack of external capacity in relation to their former colonial master, which effectively made them vulnerable states. Jarret (1996) continues that “the demise of the African states under colonialism can be seen as the lack of many (crucial and needed) aspects, such as lack of industrial development, the dehumanising routinisation, the devaluation of work, and the imposition of colonialists’ languages as the main tools of communication.” Maritz (1987: 120) says that after the colonial period, “millions of Africans are threatened by famine, real incomes are continuing to decline, foreign debt is increasing at an alarming rate and socio-political institutions are disintegrating” which has resulted in their further economic underdevelopment. The colonial states had been states with weak instruments for entering into the social and cultural realm over which they presided (Cooper, 2002: 5).

Another factor affecting development on the continent, besides, but crucially related to colonialism, is conflict. Addison (1998: 1) says the effect of the colonial and civil wars is not only damage to their economies, but also their inability to manage their political transitions. The rebuilding of the affected economies “involves reconstructing communities, revitalising private sectors, and building state capacities”. These structures are difficult to rebuild due to the scarcity of financial resources and skills. Both Addison (1998) and Cooper (2002) also mention the distorted infrastructure as a serious effect of the wars across the continent.

These experiences have come to give economic underdevelopment in many African nations a particular character. However, the question arises as to whether the attempts which continue to be made by African countries to address their problems are substantial enough or whether they will remain an illusion (Anamuah-Mensah, 2000: 1). Addison (1998: 8) argues that a crucial step away from economic underdevelopment in Africa depends on reaching political settlements that can mediate ethnic and regional differences; it is only then that peace and growth can be sustained.

Mungazi (1982: 210) adds that no one better than the leaders of African countries understand the needs of Africa. They understand that they have to fulfil certain obligations towards meeting the needs of their people. This is especially so with rising populations, which over the years can cause more political and social-economic problems. In this context, it is important for African leaders to invest in the education of their citizens, rather than investing in their military.

Anamuah-Mensah (2000: 3) recognises that the great accomplishments in socio-economic development are achieved as a result of effective human resource management. It is through human development that economic and social growth can be realised, which can bring about better living conditions. However, this human development can only be realised by the provision of proper education, as no meaningful development can take place without education (Kwapong, 1993).

## **2.2 Development challenges in Education**

Shukla & Kaul (1998: 11) see the purpose of education as that of providing a better quality of life for human beings. They continue by describing education as the means by which knowledge and skills are imparted to individuals and therefore as helping the process of social transformation. Szirmai (2005: 213) adds to this by explaining that education is “one of the basic human rights and a developmental

goal in its own right". Cheru (2002: 64) describes education as "the cornerstone of human development in every society". Education provides the promotion of economic growth and development. However, this growth and development can only be achieved through investment in human capital (Szirmai, 2005: 213). A simplified explanation of education is given by Mandela (as cited in McKnight, 1996: 114); "Education is the great engine of personal development. It is through education that the daughter of a peasant can become a doctor, that the son of a mine worker can become the head of the mine, that a child of farm workers can become president of a great nation".

The link between economic underdevelopment and human capital is made by various authors. Moleke (2005) argues that human capital, through education, has a growth effect on the labour market. Sager (2005) sees education as an important investment in building human capital which enables an increase in technological innovation and economic growth. Szirmai (2005: 214) adds to this by saying that the more educated people become, the better their skills development will be, and therefore the more productive they will be for economic growth. This is supported by educational economists who demonstrate "the importance of the quality of education, as indicated by learning achievement, for national economic development" (Hanushek and Wößmann as cited in Barrett, 2011: 120). The more educated and skilled workers there are, the stronger an industry can become, thus the stronger the human capital, the stronger the economic growth of a nation.

To continue on the effects of globalisation on education, Carnoy (2000) explains that globalisation influences this aspect of society in three essential ways. Firstly, he addresses the impact that globalisation has in financial terms, referring to governments having to find other funding to establish their effective education systems, as public spending has to be cut. Secondly, the labour market is influenced by globalisation in the way that the demand for higher educated workers is increasing through the attraction of capital, including foreign capital. Higher education especially, needs to be expanded to be able to meet the demand for highly skilled workers in the growing and changing economic and global labour market. Thirdly, the pressure on national education systems is increasing as these systems are, through globalisation, often compared internationally. This means that there is increased competition between nations to adapt their education systems in such a way that theirs is the closest to what is needed in order to compete effectively within the global market. Specifically focusing on the first way, Carnoy (2000) says that it can be concluded that not all the countries around the globe are able to bring their education to such a level that it can compete with other countries within the global market.

Tikly (2001) establishes a link between globalisation and colonialism. He argues that the globalisation of education started at the beginning of colonialism, for which he gives three main reasons to support his view. Firstly, colonialism increased the spread of existing education systems. What he means here is that when a country was colonised, the existing education system was either replaced by the education system the colonising powers were using, or the indigenous system was mixed with the colonising system. Either way, these systems provided the base on which their post-colonial education systems, whether reformed or not, were built. Secondly, Tikly argues that colonial education can be seen to be the main vehicle for spreading the economic, cultural and political features of globalisation. A prominent example is the development of trade. Within the colonised countries, labourers were trained or educated in such a way that they were qualified enough according to the standards of the colonising power, and were therefore able to help the colonised country to compete on the global market. Thirdly, colonial education played an important role during the liberation struggles on the continent. Many important intellectuals were schooled through colonial education which provided them with the knowledge of how to organise resistance to global forces (Tikly, 2001).

Through the influence of globalisation, many developing countries were often forced to take out loans so they were able to economically build up their country in such a way that it could begin to compete with the global world. Through the enormous debts that followed, various new institutions had to be established to provide support for developing countries in financial need. Some of the most outspoken institutions are the International Monetary Fund (IMF), the World Bank and the World Trade Organisation (WTO). The institution that has the most powerful influence on the developing world is the World Bank. Peet (2003) says that this institution developed, often in co-operation with the IMF, through the Bretton Woods Agreement, which offered solutions for financial crises within countries. Although this seemed to be the best solution for the problem, the introduction of the Structural Adjustment Programmes (SAPs) gave the World Bank more control over countries as these SAPs were used to determine the availability of loans. The implementation of SAPs made the World Bank and IMF more powerful than some governments, and many 'sovereign' states saw their fate being influenced by these powerful institutions (Peet, 2003). Chakaodza (1993: 16) defines SAPs as "a process which aims at making national economies of developing countries more efficient, more flexible and better able to use resource".

In order for a country to obtain a loan, it had to comply with the SAPs conditions set by the World Bank. These focused on economic reforms such as the devaluation of currency, making exports cheaper (therefore facilitating the foreign traders ability to purchase export products in larger quantities), and

enabling exporting countries to remove the balance of payment constraints (Chakaodza, 1993). Another 'recommendation' is wage restraint, which gives employers the opportunity to pay what they like, as no minimum standard wage is set. These restraints would enable companies' production and profits to grow, and in the end, it would help to create more job possibilities. In addition, removal of subsidies helps traders to sell their goods at market value. As more goods would be sold, this enables the trader to produce more, sell more, earn more and create more jobs (Chakaodza, 1993). Other conditions include the removal of price control, the deregulation of trade, the removal of tariffs and other import controls, the encouragement of foreign investment and the privatisation of national industry. There is a strong focus on trade liberalisation.

As stated earlier, another feature of SAPs is the reduction in government expenditure on public services such as education and health (Peet, 2003; Chakaodza, 1993). These services, many of which were previously subsidised, are now only available to those who are able to afford them. Basically, the World Bank wanted to terminate free services and to introduce charges for these. As a result of this, educational development in developing countries was obstructed, as the World Bank was now in control, not the governments, and this led to the decline of proper educational development in developing countries.

Besides the influence of the World Bank on educational development, economic underdevelopment in a country also has an influence. Economic underdevelopment in this context is caused by various deficiencies, such as the lack of enough financial aid to reform the various layers of an education system, the lack of a strong curriculum, the lack of qualified teachers, the lack of available resources and the lack of adequate school buildings (infrastructure).

### **2.2.1 Development challenges in African Education**

As stated earlier, the (economic) underdevelopment of African education emanates from the colonial period. Geo-JaJa (1999) explains that an important weapon in colonial imperialism was that of imported education systems. These systems were designed to produce low level employees to provide labour for a minimum wage, and to avoid locals becoming too intellectual. Mungazi (1982) agrees with Geo-JaJa (1999: 16), saying that the educated Africans, according to the colonial empires, would threaten the colonial system. He continues by stating that the colonial empires would lose their domination over the African if they provided unlimited educational opportunities. If there was a possibility for the Africans to

participate in education, it would be minimal, and it would not enable them to participate in the affairs of their country (Mungazi, 1982: 189). Jarrett (1996: 51) argues that education during colonial times destroyed pride and mis-structured Africa's history.

In contrast to Mungazi (1982), Lindsey (1975: 9) makes the point that educational opportunities were provided by the colonial powers, but only to produce African elites. These elites were then used for managing communication between the colonial power and the 'subject people'. Whichever interpretation is correct, the fact of the matter, says Cheru (2002: 72), is that "the provision of elementary and secondary education on the eve of Independence took a racial pattern that was characteristic of the colonial mode of development". At the end of the colonial periods, the former colonies were often left behind with an education system that was developed to avoid producing well-educated learners, and therefore were often not of any interest to the former colonies. The main challenge for the African nations, after independence, was to rapidly produce "large numbers of educated people to promote rapid economic growth and the Africanisation of the economy and public administration" (Harbinson & Meyers, 1964; Schultz, 1961: 1-17, as cited in Cheru, 2002: 70). Geo-JaJa (1999) states, in addition to Harbinson & Meyers (1964) and Schultz (1961) that "there can be no true economic development without education of and by Africans for African purposes".

Another aspect that influenced the development of education in post-colonial Africa is globalisation. Copious examples can be found to show the impact of globalisation on education systems. A significant example in the post-colonial context is the spread of educational forms, systems and schools through religion, specifically Islam and Christianity. Each religion uses its own system which is often different from the indigenous education systems (Tikly, 2001).

It is not only through colonialism and globalisation that the development of African education has been hindered. As outlined in the previous section of this literature review, the World Bank and its Structural Adjustment Programmes (SAPs) have had and still have a major influence on the development of education, and thus African education.

## **2.2.2 Development challenges in Education in the Zambézia province**

One fact made clear in the literature is that at the end of the civil war Mozambicans “were ill prepared to rebuild their country, as they were given limited access to the educational system under colonial rule and were challenged further by drought and flooding” (Roby *et al*, 2009: 344)

Limited as the literature is for the Mozambican education system, it is even worse with respect to the Zambézia province. Researchers, such as Passos, Machado, Tembe & Mabuza (1996) focused on the analysis of the development of the education system in the Nampula province. Reports have been written for donors on the development of the Niassa province. Despite their clear analysis, the information obtained is not adequate for the analysis of educational development in the Zambézia province, as the government has introduced decentralisation of the education system and therefore each province has gone through different developments (EFA, 2000a). For the Zambézia province, this involved the decentralisation of significant administrative authorities, which greatly complicated the lives of provincial, district and school administrators (EFA, 2000a). As a result of this decentralisation, the development of the curriculum, teacher training, financial management, and the liaison with the surrounding community was now in the hands of the district authorities or schools, and no longer a responsibility of the Government.

It is clear that there is a gap, not only in the available literature on the Zambézia province, but also in the availability of published research done within the Zambézia province. However, up until the beginning of 2011, the main education donor within the Zambézia province, DANIDA ([www.danida.org](http://www.danida.org)), has assisted MINED to develop a profile on the education sector in this often overlooked province. This profile, *Perfil da Educação*, outlines the education system as it was in 2004, in contrast to the national education statistics. Another report, *Evaluation of Zambézia Education Programme in Mozambique*, was published in 2010 by Oxfam. This programme focused on the provision of education for underprivileged groups located in the five poorest districts in the province (Gurué, Alto Molocué, Ilé, Gilé and Namarrói). It, however did not focus on the secondary education, as this research has done, but looked only at both the EP1 and the EP2 phases of the national education cycle.

The Zambézia province was one of the provinces worst affected by the civil war ([www.ilo.org](http://www.ilo.org)). Oxfam (2010) noted that the province was devastated. It began with a shortage of resources and what infrastructure that was there was severely damaged by the war. More recently the province, the most densely populated in the country, is described as struggling with “the lack of safe water, due to a shortage of rain, the drying up of water sources and the breakdown of water facilities (...) which was reflected in high levels of cholera in the most drought-affected districts” (Oxfam: 2010). Close to the

beginning of the civil war, there was a 72 percent (primary and secondary education) enrolment rate overall, measured in 1983. Towards the end of the war, the overall enrolment rate declined to approximately 43 percent, measured in 1991 (MINED, 2004: 11). The civil war also left its traces in the destruction of the schools. About 80 percent of EP1 schools and 30 percent of EPS 2 schools were destroyed between 1983 and 1989 (MINED, 2004: 11); unfortunately, no statistics were found on the percentage of the destroyed secondary schools.

Like the other provinces, the post-independence history of the Zambézia education system has been characterised by the reconstruction of the sector, as in the aftermath of the civil war. From 1992 onwards, tremendous efforts were made to reconstruct and rebuild the destroyed schools and to re-establish the education sector (MINED, 2004: 11). These efforts were reflected in the statistics of the period between 1992 and 2003. The statistics showed that the number of EP1 schools had tripled, and that the number of ESP2 schools quadrupled (MINED, 2004: 11). This growth was the result of the Provincial Strategic Plan 2001-2005, which outlined the detailed plan for the financial allocation to various education levels (MINED, 2004: 15). A budget of over one hundred million Dollars was to be allocated across the various education levels within the province. The largest amount was allocated for the (re)construction of (new) school buildings and the rest of the remaining budget was allocated to the development of resources, school materials and teacher training (MINED, 2004: 14). The only level that was omitted from the budget allocation for re-construction and development in the provincial strategic plan was ESG2. Some more specific objectives of this provincial strategic plan that correspond with the National Strategic Plan (ESSP I and ESSP II), are improving the quality of education and encouraging more gender equality, thus persuading more female learners to participate in education. The final objective was to improve the teacher training in order to provide better qualified teachers to help establish an education system of a higher quality.

As a result of the implementation of the Provincial Strategic Plan, in 2005, 19 schools offered ESG1, of which 15 offered Grade Ten, and only three ESG2. This was a slight increase to 2000 and 2003, as in 2000, 13 schools were offering ESG1 and in 2003 15 schools offered ESG1. In comparison to the increase in ESG1, the number of schools offering ESG2 has not increased between 2000 and 2005 (MINED, 2004; Direção Provincial de Educação da Zambézia, 2005).

The differences between the number of ESG1 schools and ESG2 schools have resulted in a difficult transition from one level to the next. This causes access problems for many learners and consequently, the government has more obstacles to face in their progress to achieve EFA. How EFA stands in relation to access and other constraints in developing countries, will be discussed next.

## 2.3 Education for All

The 'Education for All' goals were established in 1990 with the aim of overcoming various problems within the education sector in developing countries. The goals were developed to achieve EFA by 2015, for all those with the right to education and who are in the need of education.

UNESCO (2000, as cited in EFA, 2002b: 13) outlines the six goals which will have to be achieved by 2015 to enable EFA. These goals focus on the provision of access to education for the more vulnerable groups of the population and are outlined as follows:

- Early childhood care and education has to be improved, focusing specifically on vulnerable and disadvantaged children.
- To ensure that all children have free access to good quality primary education, focusing specifically on children in difficult circumstances and from ethnic minorities, with the main focus on girls.
- To ensure access so that all young people and adults can meet their learning needs.
- To decrease adult illiteracy by 2015 by providing access to basic and continuing education for all adults, with the main focus on decreasing illiteracy and providing access to education for women.
- To ensure gender equality in primary and secondary education by 2015.
- To improve all aspects of the quality of education.

Hallak (1991: 3) outlines a number of obstacles to the achievement of these goals. These are discussed in five main categories: political factors, economic factors, lack of adequate demand for education, weak managerial capacity and heavy inertia. He discusses the external and internal problems countries will most likely come across in their 'battle' to achieve EFA goals by 2015. Colclough & Al-Samarrai (1998: 13) are in agreement with Hallak. However, their opinion on the obstacles is less pessimistic, and they argue that by increasing public expenditure and implementing various reform programmes, no obstacle is insurmountable to achieve EFA. Marshall (2010) adds a sixth category to the obstacles described by Hallak, she addresses the impact of religious factors.

Brock - Utne (2000: 1) says that there are two "great districts of concern" for African countries in achieving EFA. These concerns deal with "the content of schooling, the relevance for the situation

children are in, and the other one deals with the language in which the content is transmitted". Cheru (2002: 64) argues that despite the improvements made by African Governments, greater challenges lie ahead if the global goal of EFA is to be achieved. The challenges, as Cheru (2002: 65) discusses them, deal with the Governments' enormous financial need in order to achieve their set goals.

Despite these concerns UNESCO (2011) reports that "extraordinary progress" has been made in achieving the above stated goals, but even with this progress there is still a gap between what has been achieved up until now and the goals set for Education for All by 2015. In regards to Africa and the improvements made by African Governments, Harsch (2000: 14) sketches a more statistical view by saying that 17 million more African children are receiving education in comparison to a decade ago. However, 42 million African children out of 113 million worldwide, have never been to school. Worldwide the number of out of school children has dropped significantly from 105 million in 1999 to 72 million in 2007 (UNESCO, 2010: 55).

It can be concluded that Governments still face major challenges to "ensure that increased access is equitable across all groups, and does not serve to increase inequalities" (Christie *et al*: 15) and through this achieve EFA.

### **2.3.1 Education for All in Mozambique**

Mozambique endorsed the Declaration on Education for All in 1990. In 1992, the Mozambican Government began to identify weak elements within the education sector, which would have to be improved to achieve EFA. The conclusion was that whilst working towards reaching EFA goals, the education system would have to go through substantial and radical changes however, without causing "disruption and chaos in an already weakened system" (EFA, 2000a). Consequently, as outlined in EFA (2002a), several targets were established to achieve EFA. These targets focus primarily on the increase in coverage and the improvement in the quality of the education system and aim to:

- increase the national enrolment rate up to eighty six percent, especially increasing the enrolment rates for girls.
- increase the number of teachers and schools to create more classes and therefore decrease the student/teacher ratio,
- provide better basic amenities and resources,

- reduce repetition and drop-out rates,
- improve the curriculum with more relevant districts and teaching methods,
- decentralise functions within the Ministry of Education to improve methods in data collection and monitoring,
- increase the number of teacher training colleges and improve the quality of existing colleges.

To increase the quality of progress towards EFA, and where needed, implement policies towards EFA, the Mozambican Government introduced the Mozambican Education for All Movement (MEPT). Mario & Nandja (2005: 4) explain that the MEPT initially designed policies that highlighted the role of literacy. They say however, (Mario & Nandja, 2005: 4) that these newly designed policies never clearly stated *what* has to be done in order to decrease illiteracy amongst the population.

In the Ministerial Seminar (2005: 6), it is stated that some improvements have been made towards achieving EFA. However, the rural districts were hardly taken into consideration. The government and the International Agencies who support the government in achieving EFA, will still face obstacles concerning the disparities between the urban and rural districts (Ministerial Seminar, 2006: 6), where more than half of the population lives.

However, as stated in UNESCO (2006: 24) “Mozambique has developed a considerable number of tools, experiences and initiatives” towards EFA. This has been achieved with the support of UNESCO, by introducing an Education Policy Simulation Model (EPPS), which focused on the decentralisation of the SNE. With the EPPS being decentralised to a provincial and district model, information on school enrolments can be provided more easily to foresee recruitment and training needs per year, therefore provincial progress towards EFA can be monitored (UNESCO, 2006: 27).

Several strategies are incorporated into the EPPS, developed by the Mozambican Government to increase the progress towards achieving EFA. These strategies focus on social disparities, expanding access by providing access and equity, and promoting access to girls. These two strategies will be discussed in the next section of this literature review.

#### **2.4. Expansion of Access to Education by providing access and equity**

Despite the number of schools in developing countries, many of these schools are still not accessible to all those with the right to education. This is supported by Mutorwa (2004), who has outlined the factors and barriers that affect access. Besides financial constraints and economic factors, Mutorwa (2004: 44) draws attention to demographic and geographical factors, linguistic issues, HIV/AIDS, marginalisation and poverty, and hostel accommodation as the main barriers to access. However, while the main aim of the EFA goals is to achieve universal access to primary education by 2015, it is important not to overlook secondary education. Secondary education has to be adequately accessible to provide a smooth transition for learners finishing primary school. Both King (2009) and Lewin (2009) explain that the MDGs, and thus EFA, focus mainly on primary education which causes an imbalance throughout the education sector as there is no such focus on secondary education.

National and provincial (Zambézia) statistics show that more learners finish primary education than there are places on offer in secondary education (MINED, 2004: 66). These statistics show that in 2003 there were eight thousand and sixty nine (8069) EP1 schools, nine hundred and sixty two (992) EP2 schools, one hundred and twenty four (124) ESG1 schools and only twenty nine (29) ESG2 schools. The national statistics clearly outline the access possibilities (school availability) across the provinces. In the Zambézia province, out of the total number of nineteen hundred and nine schools (1909), 92 percent are EP1 schools, seven percent are EP2 schools, nil point eight percent are ESG1 schools, and only nil point two percent are ESG2 schools (MINED, 2004: 66).

As a result of these statistics, the Mozambican Government developed the earlier mentioned strategies to support achieving EFA. Concerning the expansion of access, the government developed alternative scenarios and strategies which primarily focus on the development of primary education (EFA: 2000a). However, C0 has no influence on the development of primary education. It was used as a reference point for the situation before the implementation of the developments and provided C1 and C2 with a guide to improvement. These scenarios, C0, C1 and C2 were projected as follows:

- C0: this is the basic scenario and assures that important parameters (such as admission rates to EP1, transition rates from one level to next, internal efficiency, and the student/teacher ratio) will not undergo major changes until the year 2000.
- C1: this encourages a slight improvement of the important parameters outlined in C0. Internal efficiency will be improved slightly, resulting in education of a higher quality. However, there will still not be a primarily focus on the transition rates and student/teacher ratio.
- C2: This focuses on increasing the gross enrolment rates.

Through these scenarios, the government aims to not only create better access, but also equity in education. These two stand strongly in relation to each other and are measured according to the following guidelines provided by the Government:

- Increase access and accessibility and improve the social-educational environment, with a focus on gender and geographical disparities, and the reduction of repetition and drop-out rates.
- Encourage the complete offer of EP1 at schools and include EP2 to make a complete primary education cycle of seven grades.
- Support community involvement for the building of school premises; through this, local families are financially supported for education and other needs.
- Increase the possibilities for education through mass media such as television, radio and video.

To ensure access and equity, various disparities have to be resolved in the Mozambican education sector. However, the main priority according to these strategies is to promote access to education for girls.

#### **2.4.1 Promote Access for Girls**

Achieving gender equality in education is the fifth goal of the EFA goals. In EFA (2002b: 68), it is argued that gender disparities in primary and secondary education have to be eliminated by 2005, “ensuring girls’ full and equal access to education and achievement in education of good quality”.

Disparities between boys and girls starts with access to primary education (EFA, 2002: 71) and are not only concerned with access, but also other factors such as completion rates of primary school, and the differential progress of the learning process (EFA, 2002: 72). Other factors that influence gender disparities are related to household factors, environmental factors, social and cultural factors (Ruby *et al*: 2009). Gender disparities are most severe in Southern-Africa, where “boys repeat grades more frequently than girls” (EFA, 2003: 71). However, girls who gain access to secondary schooling are probably less well prepared academically due to intensive home duties and greater absenteeism at primary level. As cited in EFA (2003: 71), “countries with large disparities in favour of boys in primary education further accentuate these disparities in secondary education”.

International statistics show that in many developing countries, boys are still favoured above girls at both primary and secondary level (EFA, 2003a: 71). Despite these statistics that show that girls are slightly favoured more than boys in Mozambique (EFA, 2003a: 68), the statistics provided by MINED (2004: 48) show the opposite. On a national level, in 2003, from EP1 up to ESG2 the percentage of enrolment amongst boys is sixty eight percent, whereas the enrolment amongst girls is forty two percent. When focusing on the Zambézia province, the disparity differs more, with thirty five percent of girls attending school in 2003, slightly increasing to thirty seven percent in 2006.

To promote access to education by girls, the Government has developed strategic measures to ensure equality amongst boys and girls in primary and secondary education. These measures are as outlined in EFA (2002a):

- Create a school environment which is sensitive to gender issues.
- Develop programmes which enable the education authorities to estimate educational needs at provincial and district level.
- Create social awareness of the need to reduce the domestic workload of girls.
- Involve external organisations in the development of programmes to promote education for girls.
- Increase the number of female teachers, and provide female teacher trainees with better circumstances throughout their training.
- Provide financial support to schools and families for the purchasing of school materials.

These strategies are in alignment with the initiatives developed by the EFA to promote access to education for girls (EFA, 2002b: 68). These strategies push Governments to encourage girls' participation in education, by for example, providing free education for girls, enabling scholarships, improving school environments and promoting the increase in the share of female teachers.

## **2.5 Summary of Literature**

The literature review pictures the foundation of economic underdevelopment and its inference to educational development. It outlines the two major causes as described by various authors, of economic underdevelopment as colonialism and conflict.

Educational development, with a focus on the African continent, has been influenced by colonial inference, conflict, globalisation and the implementation of SAPs. Within the educational context, these four aspects are seen as the main causes of economic underdevelopment.

Post-colonial educational development in Mozambique has been influenced by these influential aspects of economic underdevelopment. It became clear that despite the implementations of various sector-related strategies, the Mozambican Government has not been able to overcome the major issues it has been facing for decades. This is specifically the case for half of the population who live in the rural areas. Despite the available literature on the Mozambican education system, there are still areas that are under-researched. One of these areas, within the Zambézia province, shows the understanding of the magnitude of access limitations caused by economic underdevelopment. This is the gap that this study partially intends to fill.

# CHAPTER THREE

## RESEARCH DESIGN AND METHODOLOGY

As described earlier in this thesis, this study is an interpretive case study research which uses questionnaires, one-to-one interviews and focus group interviews. The purpose of this chapter is to justify the rationale behind this chosen approach. It explains the methodology that supports the methods used in this research. Sikes (2004, as cited in Opie, 2004: 15) argues that methods and methodology are not the same things, and to avoid these being used interchangeably, each needs to be defined clearly. Scott & Morrison (2006: 153) define methodology as

the theory (or set of ideas about the relationship between phenomena) of how researchers gain knowledge in research contexts, and why. The 'why' question is critical since it is through methodological understanding that researchers and readers of research are provided with a rationale to explain the reasons for using specific strategies and methods in order to construct, collect and develop particular kinds of knowledge about educational phenomena.

Methods are the range of approaches (techniques or tools) used in educational research to gather data which are to be used as a basis for inference and interpretation, for explanation and prediction (Cohen *et al*, 2000: 44).

### 3.1 Summary of Goals

The goals for my research are as follows:

- to identify the socio-economic challenges learners from rural districts face when accessing Grade 11, the first grade of Pre-University level of secondary education.
- to gain a better understanding of the Mozambican education system with respect to access.
- to establish what significance underdevelopment holds for access to education for learners from rural districts.

To reach these goals, I decided to use an interpretive approach. This will be discussed in the next sections of this chapter, in order to obtain a clearer sense in relation to my research.

### 3.2 The Interpretive paradigm

The interpretive paradigm focuses, in small scale research, on the individual and individuals within groups, where the researcher aims to interpret the specific. Scott & Morrison (2006: 131) say that social actors negotiate and make meaning as they go about their activities in the world. The interpretive paradigm, Packer (1999) adds, aims to characterise *how* people experience the world, the ways they interact together, and the settings in which these interactions take place. Cohen *et al* (2000: 23) explain that the interpretive researcher begins with the individual and sets out to understand his/her interpretations of the world around them.

In considering the relationship between underdevelopment and education, I thought that the interpretive paradigm would be most appropriate for understanding the issues. This is supported by Janse van Rensburg (2001: 16) who argues that this paradigm is most appropriate for research with individuals or small groups where the objective (see Cohen *et al*, 2000: 22) is to understand the subjective world of human experience and, so to speak, to get inside the research participants' heads and "to understand from within".

There are, however, as Scott & Morrison (2006: 133) suggest, a number of problems with the interpretive paradigm.

- the interpretive paradigm does not take account of the multi-perspectival nature of the descriptions of social reality
- rarely do social actors engage in deliberative activity about their actions
- unadulterated re-description of someone else's reasons for their actions is not possible
- the purist forms of interpretivism are unable to account for institutional and discursive structures that position the individual in various ways
- and a more fundamental criticism; it suggests that it is illegitimate to conflate these interpretive activities with a full and complete understanding of the world

Ruddock (1981, as cited in Cohen *et al*, 2000: 120) adds to this by suggesting that qualitative methodologies are criticised for being impressionistic, biased, commonplace, insignificant, ungeneralisable, idiosyncratic, subjective and short-sighted. Bearing these challenges in mind, it remains the case however, that it is only possible through deep engagements with individuals that one might understand how qualitative methodologies can be interpreted.

### **3.3 The Case Study**

“A case study is research that investigates a case in depth” (Mouton, 2001: 49). Scott & Morrison (2006: 17) add that for a case to be investigated in depth a large amount of data has to be collected. Nisbet & Watt (1984: 72, as cited in Cohen *et al*, 2000: 181) describe the case study as “a specific instance that is designed to illustrate a more general principle”.

Fraenkel & Wallen (2000: 392) argue that much can be learned from studying just one individual, one classroom, one school or one school district. Cohen *et al* (2000: 181) add that the case study provides a unique example of real people in real situations, enabling readers to understand ideas more clearly than by simply presenting them with abstract theories or principles. Based on this, I will research the real situation of one school instead of looking at a number of schools.

### **3.4 The location and the participants**

This research was conducted at a school that was classified as urban in this research, in the Zambézia province in Mozambique. Throughout the reporting of my research the school will be referred to as ‘the school’ for anonymity.

I decided on this location for my research because of my previous employment at the school, I was familiar with the Mozambican education system, the school, the school management team and most of the teaching staff.

When I first approached the school principal about conducting my research at his school, he responded with a degree of reluctance. His concern was that the outcome of my research could bring to the fore

issues that could harm the school. However, when I explained that neither the school nor the participants would be named during the research and reporting, he responded positively.

The study itself involves a small number of participants, which is characteristic for interpretive research, as outlined by Cohen *et al* (2000: 35). The participants for the questionnaire came from three different Eleventh Grade classes at the school. They were chosen after the analysis of the geographical origin of the questionnaire participants. For the focus group interviews, I selected participants from different rural districts. The one-to-one interviews were conducted with participants from the same rural districts as the participants from the focus group interviews, and, in addition, with participants from different rural districts.

All of the participants in the questionnaires and the interviews were in the Eleventh Grade at the school. None of the staff members, at any level, were involved in this research.

### **3.5 Data collection techniques**

For the research, as is discussed below, I used questionnaires and interviews. Two different kinds of interviews were conducted; focus group interviews and one-to-one interviews.

#### **3.5.1 Questionnaires**

The purpose of the questionnaire classically, is to collect large-scale information in an efficient and timely manner. It is designed, mostly through the use of a single instrument, to avoid duplication of purpose and to focus on particular issues with large samples of subjects. It is most frequently constructed around close-ended questions which might be structured around a scale, but it can in some instances, draw on open-ended questions which allow a more personal response from the participants. Tuckman (1994: 227) argues that the “question format is based on whether the researcher is attempting to measure facts, attitudes, and preferences”. According to Oppenheim (1992, cited in Cohen *et al*, 2000: 247) questionnaires enable the researcher to make comparisons across groups, as questionnaires have the advantage of the ability to be given to a large number of participants (Fraenkel & Wallen, 2000: 142).

Verschuren & Doorewaard (1998: 153) outline some important characteristics of research done through questionnaires. Firstly, as Fraenkel & Wallen (2000: 142) say, they are large scale in nature. Secondly, they often have the intention of obtaining a broad scope of information. Thirdly, research of this nature provides a researcher with a large quantity of data.

An aspect that needs to be carefully considered is the ordering of questions in the questionnaires. Opie (2004: 100) explains that the question order is decided on by the researcher. Often, researchers begin with open-ended questions and leave the close-ended questions for a later stage. However, some researchers begin with close-ended questions and end with open-ended questions to obtain participants' attitudes towards certain situations.

### **3.5.2 Interviews**

In this research, I used two different types of interviews: focus group interviews and one-to-one interviews. Focus group interviews are effectively a discussion between the participants facilitated by the researcher, whereas one-to-one interviews seek to elicit more extensive information from the participants, including how they individually feel about a certain situation (Fraenkel & Wallen, 2000: 509). The purpose of the interview, as a result, is to elicit greater depth about a selected topic from a subject. Opie (2004: 111) explains that in interviews, participants are encouraged to develop their own ideas, feelings, insights, expectations or attitudes.

For my research, I made use of the semi-structured interview, as this allows the participants the time and scope to talk about their opinions. However, I had already decided what the focus of the interviews would be. Cohen *et al* (2000: 147) explains that semi-structured interviews allow flexibility; they enable the participants to "project their own ways of defining the world".

Focus group interviews have a similar purpose as one-to-one interviews. However, in so far as they depend on the quality of group interaction, they provide the researcher with a sense of the texture of the participants' views on the research topic. Cohen *et al* (2000: 288) explain that "the participants interact with each other rather than with the interviewer, such that the views of the participants can emerge". In this respect, it is important that the participants feel comfortable in each others' presence, and as a result feel free to talk. The participants in the focus group interviews knew each other from

school and shared their opinions on the question of what it meant to come from rural districts to the urban area where their school was located.

### **3.5.3 Data Capturing**

For the data capturing I used the following methodology; first of all, I used self-administered questionnaires and secondly, a tape recorder to capture data during the various interviews. Thirdly, I gathered statistical information from the Provincial Education Department, the District Education Department and the school.

The use of questionnaires comes with both advantages and disadvantages. For Opie (2004: 95) the use of questionnaires is seen as “relatively economical, respondents in distant locations can be reached, the questions are standardised, anonymity can be assured, and questions can be written for specific purposes”. However for Bell (1999), while questionnaires provide many answers to questions, it is often not easy to find the answer to the ‘why’ question. Bell (1999: 14) continues that “casual relationships can rarely if ever be proved by a questionnaire”. The main emphasis is on fact-finding.

To begin, I handed out a pilot questionnaire in two different classes of the Eleventh Grade. Oppenheim (1992: 47) argues that piloting helps to develop the questionnaire to maturity, and it helps with the wording and the ordering of the questions sequence. After the pilot, I edited the questionnaire into the version used for this research. This was then handed out in four Eleventh Grade classes different from the classes who received the pilot. Opie (2002: 105) agrees with this method and explains that using the version of the questionnaire in the same group as the pilot can cause bias, as the participants can “become sensitised to the questions so that any answers they give in the main study will be influenced in a different way from those who have not”.

The questionnaire contained mainly closed questions, but to get more specific answers, specifically the answer to ‘why?’, some open-ended questions were included where needed.

To capture the interviews I used a tape recorder. According to Opie (2002: 112) the purpose of an interview is to get the participants “to say what they think and to do so in greater richness and spontaneity”. The interviews were semi-structured, beginning with some structured questions, and shaped by a set of structured questions that had to be asked. Despite some arguments given by Opie (2002) on using tape recorders in semi-structured interviews, I decided to tape the interviews to be able

to re-analyse the data later, specifically to avoid misinterpretation through possible language misunderstandings.

To make myself more familiar with the captured data, I re-read the questionnaires several times and listened to the interviews. This data was then structured and analysed according to assigned codes. As with the questionnaires, the interviews were mainly done in Portuguese, with some exceptions made for participants with an adequate competency of the English language to be able to understand the questions and answer them accordingly.

### **3.5.4 Limitations of techniques**

Various authors have expressed their concerns about the limitations of the techniques used in my research. Tuckman (1994: 226) argues that despite the fact that questionnaires are commonly used, they limit the personal and revealing information that can be obtained, as the kinds of questions that can be asked are limited. Fraenkel & Wallen (2000: 142) add to this, suggesting that possible unclear questions posed to the participants cannot be clarified, and when the participants feel, with respect to some questions, a need to expand and elaborate, there is often no opportunity to do so. Scott & Morrison (2006: 193) outline two politically-focused limitations. Firstly, they argue that questionnaires “tend to be larger-scale numerically” and secondly, they argue that the data obtained from the questionnaires are vulnerable to manipulation, either by the researcher or others, who read the results as how they would like them to be for their own benefit.

The limitations for the interviews are of a different scope and Cohen *et al* (2000: 121) outline one such limitation - that interviewers and interviewees alike bring their own, often unconscious experiential and biographical baggage with them into the interview situation. Hughes (1989, as cited in Cohen *et al*, 2000: 121) adds that the researcher, through human interaction with the participant, will have some influence (through his or her own experience or biographical baggage) on the participants and therefore on the data. Patton (1990, as cited in Fraenkel & Wallen, 2000: 387; Tuckman, 1994: 374) relates the weaknesses of interviews to the data collection process, which can be quite difficult, as information is collected from different participants. Fraenkel & Wallen (2000: 389) argue that before the researcher gets the most honest answers, and not the answer the participants think the researcher would want to hear, the researcher needs to create a bond of trust with the participants. However, this is not always possible due to time limitations on the research.

This is similar for focus group interviews. Morgan (1997: 15) argues that participants are more likely to withhold things within a group than they might say in private. Some participants participate more openly than others, with or without a bond of trust between the researcher and the participants. Catterall & Maclaran (1997, as cited in Puchta & Potter, 2006: 23) refer to the participants' involvement as high-involvement and low-involvement, which depends on the relevance of the chosen subject for the participants. The participants' involvement does not only depend upon the subject relevancy, but also upon the group dynamics (Puchta & Potter, 2006: 21). A positive group dynamic will limit the danger that the participants withhold expression of their true opinions.

Krueger (as cited in Morgan, 1998: 49) explains that to avoid such limitations, the researcher has to take several aspects into consideration before conducting a focus group interview. Firstly, he argues that the researcher needs to avoid too many or too few participants in a focus group. For my focus group interviews, I decided on a maximum of six participants and a minimum of three participants in each focus group. Secondly, it is important for the outcome of the focus group interview to avoid any distractions from outsiders, which in my research was sometimes more difficult. Due to ethical considerations, I did not want to conduct the focus group interviews at the school, so I chose a different location where throughout the focus group interviews, interruptions took place due to extreme outside noise, such as cars and motorbikes passing by and dogs barking constantly.

### **3.6 Ethical considerations**

In educational research, ethical issues are important to take into consideration, especially as the subject of the research involves human beings. In my research, the most crucial ethical consideration was the anonymity of the participants. Ethics are important to avoid uncomfortable situations for the participants. Ethics are used by the researcher to protect the interests of the participants, as the information obtained from the participants could be sensitive or do harm to other participants or the school (Scott & Morrison, 2006: 88). Tuckman (1994: 13) adds that if research ethics are not taken into consideration, this can result in embarrassment, hurt and a frightening and negative affect on the participants. Frankfort-Nachmias & Nachmias (1992, cited in Cohen *et al*, 2000: 61) say that "the obligation to protect the anonymity of research participants and to keep research data confidential is all-inclusive." They continue to say that "it should be fulfilled at all costs unless arrangements to the contrary are made with the participants in advance".

Due to my previous employment at the school, I was familiar with the environment, the school principal, and most of the management staff and teaching staff. Before the start of my research, to avoid any of the uncomfortable situations outlined by Tuckman (1994), I opted for the principle of informed consent; I arranged a meeting with the principal to discuss the nature of my research and to acquire written permission to conduct my research at the school. Scott & Morrison (2006: 87 & 88) refer to the principle of informed consent as an open autocratic approach, which means that the researcher is responsible for keeping the anonymity of the participants throughout the research and the reporting. For my research, this means that the consent given by the participants and my promise to keep their anonymity is the most crucial ethical consideration to be considered.

A difficulty arose with the questionnaires, because for the follow-up phase of the work, I needed to know the geographical location of the respondents. I was thus not able to provide the participants with complete anonymity. However, to reassure the participants that they would not have to be cautious about committing themselves to the questionnaires, I reassured them that none of the questionnaires would be shown to any staff member or student at the school, and that in my dissertation none of the participants would be named.

### **3.7 Data analysis**

In this research, I firstly made use of questionnaires. For the data analysis of the questionnaires I reduced the data by editing the questionnaires. The purpose of editing questionnaires was to identify and eliminate errors (Cohen *et al*, 2000: 265). Moser & Kalton (Cohen *et al*, 2000) argue that there are three central tasks in editing questionnaires. These tasks are: 1) completeness, to check that all the questions are answered, 2) accuracy, to make sure the participants answer the questions accurately, and 3) uniformity, to check that the participants have interpreted the instructions and questions uniformly. The data reduction resulted in the establishment of codes for the various questions. Scott & Morrison (2006: 33) state that “coding is used to sort and ‘break down’ the data by looking in detail at its characteristics and provide first steps in discovering that the ‘whole’ is more than the sum of the ‘parts’ (or data bits)”.

Secondly, I made use of one-to-one interviews and focus group interviews which were recorded by a tape recorder. The analysis of the interview was done in an almost similar way to the questionnaires,

meaning that I coded the interviews. Tuckman (1994: 271) argues that codes are used for two main reasons. Firstly, he explains that coding is done when the data is gathered, but to be able to analyse the data it needs to be categorised, and secondly, he suggests that coding is a useful way of analysing data that comes in words, such as in interviews.

This research has used the codes that arose from both the questionnaires and the interviews and presented these codes accordingly.

### **3.8 Limitations of this research**

The main limitation of this research related to language. As my research was done in Mozambique, where the main language used is Portuguese, all the data collection techniques used were performed in Portuguese. Despite having to translate the data gathered into English, there was no major loss of meaning, as I am competent in both English and Portuguese. However, when there was an uncertainty about the translation, I consulted a colleague researcher whose first language is Portuguese and who is competent in English, for reassurance.

The second limitation was the location of the interviews. Ethical considerations (anonymity) constituted an important factor throughout the interview process requiring that a location away from the school had to be found. However, while an appropriate location was found, it was some distance away from the school and as a result, it took some of the participants longer to reach this location, which resulted in various delays throughout the interview time frame. This notwithstanding, all the planned interviews were conducted, but over a longer period of time than had been scheduled.

The last limitation is the fact that this research was done in one of the schools in the Zambézia province, and can therefore not be generalised to schools in other Provinces.

## CHAPTER FOUR

### PRESENTATION AND DISCUSSION OF FINDINGS

The aim of this study was to create a greater awareness of the challenges that learners from rural districts come across when they try to access a school, and the difficulties they face once they have gained access to that school.

This chapter presents a discussion based on the findings from the data gathered from the questionnaires, the one-to-one interviews and the focus group interviews. The questionnaires were first handed out as a pilot amongst two different 11<sup>th</sup> Grade classes, and then later, in an edited and final version, amongst four different 11<sup>th</sup> Grade classes. The pilot version was only used to establish whether the questionnaire in that form was understandable to the participants, and if it would provide me with the required information in order to compile this research.

The one-to-one interviews were conducted with seven participants (based on the district of origin, this information was accumulated through the answers to the questionnaires) from different rural districts other than the district the school is based in. Finally, five focus group interviews were conducted and, as with the one-to-one interviews, the participants were drawn from different rural districts to that in which the school is based.

To ensure their anonymity, and as part of the research ethics, the participants' names will not be mentioned during the discussion or at any other time throughout this research analysis. Instead, they will be referred to as Participant 1 (P1), Participant 2 (P2), Participant 3 (P3), etc. The referencing is slightly different for the focus group participants. The focus groups will be referred to as Focus Group 1 (FG1), Focus Group 2 (FG2), etc., and the participants will be referred to as FG1 P1 (Participant 1 of Focus Group 1), FG2 P2 (Participant 2 of Focus Group 2), etc.

This chapter is divided into two main sections. The first section provides a contextual profile of the school and the participants who took part in the research. This enables the reader to form an understanding of the educational context in which the participants are involved on a daily basis in relation to the participants' background.

The second section includes the main findings of this research which were derived from the questionnaire analysis, document analysis, one-to-one interviews and focus group interviews. All these methods of data gathering were valuable, and put the challenges for the participants from the rural districts into perspective.

## **4.1 The Contextual Profile**

### **4.1.1 The School Context**

The school is located in the Mocuba district in the Zambézia province, which is one of the three provinces that cover the central region of Mozambique. The town where the school is located is the second largest in the province, after the provincial capital. It is located in the central region of the province, connecting the Northern and Southern provinces, and is also situated on the road to Malawi. Despite its semi-urban status, it has distinctly rural features. It is dusty, dominated by a main 'road' where most of the local shops are located. The shops are mainly owned by people from either larger cities across the country or by foreigners. Mozambicans from rural districts move here to try and find some kind of employment.

The school is one of the three schools in the province offering pre-university education and is located on the outskirts of the town centre. The school has one main building and four smaller buildings with various classrooms. Each classroom has several desks, but not enough for the average number of learners in each class, resulting in many learners sitting on the floor throughout lessons. The blackboards are in a poor condition and can only be used in part. For most subjects, the students have to buy their own books, which are available from a local shop, though only a limited number of copies are available and prices are often unaffordable for the learners. For some subjects, there are not enough books nation-wide and these are therefore not sold in the shop, but provided by the teacher during each lesson, resulting in 20 books for an average of 80 learners.

While the school has electricity, this often does not work, which, specifically for the evening classes, results in the cancellation of lessons. Most classrooms do not have windows as most are broken, and due to the lack of finances, cannot be replaced. There is a library with an average of 50 books available for the learners which, for understandable reasons, can only be read in the library. Many books that

were donated have disappeared. The sanitation facilities are inadequate and in some buildings, the classrooms reek of the stench coming from these facilities.

The teachers are either locals or come from various districts across the country, or from Portugal and other neighbouring countries. Most local teachers do have teacher training experience, but some only have a Grade Twelve qualification. As students, these teachers excelled in a subject, and were then asked to teach it, as there were often no trained teachers available. The teachers from Portugal and neighbouring countries often have more training than the local teachers.

For the learners from other districts who do not have family or friends in the town where the school is located, the possibility exists for them to stay at the boarding school. However, there is only room for approximately 300 learners<sup>2</sup>, and the conditions of the boarding school are unacceptable, but, in a setting like this, unavoidable. There are no bathing facilities and learners have to walk to the river about three kilometres away for this purpose. The sanitation facilities are in the same appalling condition as at the school. According to one of the participants in the study who stayed at the boarding school, the learners are fed once every two days “if they were lucky”, although this could not be verified.

The learners are obliged to wear a uniform, the condition of which depends upon what their parents, guardians or caretakers can afford. However, most learners wear uniforms that are in a state of disrepair and when other siblings attend school at a different time during the day, the uniform is shared amongst them or amongst friends to lower the costs.

Over the past few years, the school has had an average of between four and five thousand learners in ESG1 and ESG2. It was only in 1999 that the school expanded from an ESG1 school to a school offering ESG1 and ESG2.

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<sup>2</sup> This number was obtained from statistical documentary provided by the boarding school. However, referencing this data would mean the name of the school would have to be named in this research. I have therefore decided to not reference it officially.

## **4.1.2 Demographic background of the Participants**

At the time of research, the participants in the questionnaires and the interviews all attended the school on which this research is based. They were all in Grade 11 and came from various places across the province and across the country. While they were all in the same grade, the age range varied amongst them.

### **4.1.2.1 Participants in the Questionnaire**

A total of 228 questionnaires were handed out amongst the participants from four different 11<sup>th</sup> Grade classes. I opted for two classes in the A cycle, one class in the B cycle and one class in the C cycle. In the analysis, these classes will be referred to as 1, 2, 3 and 4. The total number of learners in these four classes came to 357. However, an alarming total of 129 learners were absent during the times I handed out the questionnaires. In Class 1, 29 out of 75 learners were absent, and in Class 2, 43 learners of 108 were not present. Out of 97 learners in Class 3, 39 were not in attendance, and in Class 4, 18 out of 77 learners were absent..

Out of the 228 questionnaires distributed, I received a total of 201 (80 percent) back from the participants. However, four of these were not properly filled in and will therefore not be used in the analysis of the data obtained through the questionnaires. The questionnaire analysis is based on the questionnaires of 197 learners (86 percent).

The 197 learners come from various districts in the Zambézia province, whilst some learners (11) come from other provinces. The geographical origin of the learners is outlined in Table 1.

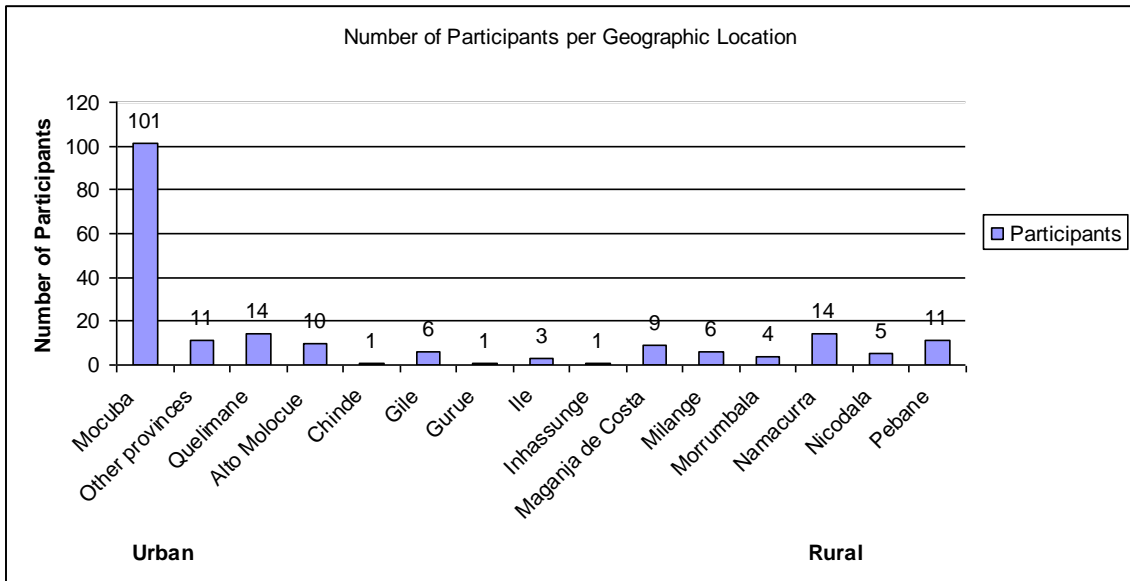


Table 1: Geographic origin of the participants.

Table 1 is divided into two classifications. The first one is 'urban' and the second is 'rural'. Urban districts in this research include Mocuba, Quelimane and the districts in the other provinces. Out of the 197 learners, 126 learners (64 percent) come from urban districts, such as Mocuba, Quelimane and districts in provinces other than the Zambézia province, and 71 (36 percent) come from the various rural districts within the Zambézia province.

The majority of the participants come from families where there is an average of six siblings; although some had as many as 13 siblings. Some families are able to send all their children to school, but most families are only able to send a few children to school. In addition to sharing a house with their parents and siblings, most of the participants have other family members or friends living with them.

The majority of the families are dependent upon their work in the fields for their livelihoods and survival, and classically present themselves as peasants. Other forms of employment and generating an income amongst the participants' families were those of teaching (29 percent), and in some instances, administration (four percent), transport (three percent) or nursing (three percent).

Despite the fact that most of the participants' family members have jobs (94 percent), this does not always generate a stable income. The amount of income earned is dependent upon the type of employment. Even when a stable type of income is generated through formal employment, this is not always guaranteed as salaries are not always paid when they are due and depend upon the economic

situation of the employer. It appeared that employees could send their employees home whenever it suited them.

I conducted the one-to-one interviews and the focus group interviews with the learners from the rural districts. The learners that participated in these interviews will be discussed in the next section of this chapter.

#### **4.1.2.2 Interview participants**

The one-to-one interviews were conducted with seven participants. All the participants come from different rural districts in the Zambézia province. These participants are described below:

- Participant 1 (P 1) is a girl from Namacurra, a district situated seventy three kilometres from the school. She lives with her parents in Namacurra, along with seven brothers and sisters, six of whom are attending primary and secondary school. The main income is generated by her father who works as a peasant. P1 attended ESG 1 in Mopeia. She pays her own school fees and during the school year she lives with family in Mocuba.
- Participant 2 (P 2) is a boy from Inhassunge which is situated 133 kilometres from the school. He lives with his mother and two brothers and sisters in Inhassunge. Both his siblings attend primary and secondary school. His mother, who works as a peasant, is responsible for the family income and pays his school fees. He attended ESG 1 in the Mopeia and Inhassunge districts. He lives with friends in Mocuba during the school year.
- Participant three (P 3) is a boy from Chinde, a district situated 201 kilometres from the school. He lives with his father and four brothers and sisters in Chinde. Both his brothers are attending school and one sister goes to primary school. His father pays for his school fees and generates income as a peasant. Throughout the school year, P 3 lives with friends in Mocuba. He attended ESG 1 in Mopeia.
- Participant 4 (P 4) is a boy from the Gilé district which is 167 kilometres from the school. He lives with his father and three brothers and sisters in Gilé. His siblings all attend secondary school. P 4 attended ESG 1 in Gilé. His father works as a driver and pays for his school fees. Throughout the school year he lives at the boarding school.

- Participant 5 (P 5) is a boy from the Morrumbala district, situated 159 kilometres from the school. He comes from a large family with eight brothers and sisters, five of whom are going to school. In Morrumbala he lives with his parents, his brothers and sisters, his brother in law, his grandfather, his grandmother, his uncle and his aunt. Both his parents work and pay for his school fees. His father works as a technical assistant in agriculture and his mother works as a domestic worker. He attended ESG 1 in Morrumbala. In Mocuba he lives at the boarding school.
- Participant 6 (P 6) is a boy from the Quelimane district which is situated about 115 kilometres from the school. He has seven brothers and sisters, all of whom attend school. In Quelimane he lives with his parents, brothers, sisters, his grandfather and extended family. His father works for the police and pays for his school fees. He started ESG 1 in Namarroi and finished it in Pebane due to the location change of his father's job. Throughout the school year he lives at the boarding school.
- Participant 7 (P 7) is a boy from Maganja da Costa, which is situated 112 kilometers from the school. He lives with his parents and his eight brothers and sisters, seven of whom attend school. His father works as an administrator in the local education department. He pays for his school fees himself with help from his father and his uncle. He attended ESG 1 in Maganja da Costa. Throughout the school year, he sometimes stays with family and sometimes with friends.

All the one-to-one interview participants were able to express themselves freely, and as the interviews progressed they felt more comfortable speaking about their situation.

#### **4.1.2.3 Focus group participants**

For the focus group interviews, I opted to have a minimum of three participants and a maximum of six participants. The participants in four of the focus group interviews all came from the same district, whereas in Focus Group Five (FG 5), the participants came from different districts or from another province.

- Focus Group 1 (FG 1) had three participants: two boys (FG 1 P1 and FG 1 P2) and a girl (FG 1 P3), who came from the Pebane district situated 133 kilometres from the school.

- Focus Group 2 (FG 2) had three participants: three boys (FG2 P1, FG2 P2 and FG2 P3) from the Milange district which is 153 kilometres from the school.
- Focus Group 3 (FG 3) had three participants: two boys (FG 3 P1 and FG 3 P2) and one girl (FG 3 P3) from the Namacurra district, situated 73 kilometres from the school.
- Focus Group 4 (FG 4) had four participants: three boys (FG 4 P1, FG 4 P2 and FG 4 P3) and one girl (FG 4 P4), all of whom came from the Alto Molocue district, 153 kilometres from the school.
- Focus Group 5 (FG 5) had six participants: five boys and one girl. The boys were from the Mopeia district (FG 5 P1) (185 kilometres from the school), the Pebane district (FG 5 P2) (133 kilometres from the school), the Alto Molocue district (FG 5 P3) (153 kilometres from the school), Mangulamelo in the Mocuba district (FG 5 P4) (19 kilometres from the school) and Morrumbala (FG 5 P5) (159 kilometres from the school). The girl (FG 5 P6) was from the Mochava district in the Maputo province, which is 1107 kilometres from the school.

Most of the focus group participants felt comfortable in each others' presence; they all knew each other from school and some of them were friends or lived together. One of the participants (FG5 P2) however, did not want to expand on his social problems with the other participants of the focus group. Throughout all the focus group interviews he was the only one who did not feel comfortable in sharing his social situation with the others and me. He did however, talk about his other problems. The other participants were all 'happy' to share their situation with each other and with me.

## **4.2 Main Findings**

In this section, the participants' challenges are examined in greater depth. The key questions posed were to clarify the challenges the participants from rural districts face when accessing the school and what the challenges are that these participants face once they had gained access to the school.

Through the analysis of the questionnaires and the various interviews, it was revealed that the challenges the participants face can be divided into three major themes and one minor theme. The major themes that emerged are:

- Dinheiro
- Educação

- Social Dilemma's

The minor theme that this research came across is health issues.

Each theme is divided into several sub themes, which enables the reader to understand the magnitude of each of these themes in relation to the access to, and the access in the ESG2 cycle of the Mozambican education system.

#### 4.2.1 Dinheiro

Dinheiro – the lack of money – was a theme that predominated the conversations and the evidence provided by the participants. It was clearly the largest issue revealed in the research. This section of the dissertation looks at the significance of a lack of financial means and attempts to outline what lies behind this need and how it comes to give economic underdevelopment in Mozambique its particular character relating to education.

Through this research, it emerged that dinheiro or money is by far the biggest challenge the participants have to go through in their quest to gain access to education, and to survive at the school. This is a result of the poverty many Mozambicans live in today caused by economic underdevelopment.

Throughout the Focus Group interviews the lack of money appeared to be a major challenge. FG1 P1 said *'I don't have money for anything'*. In this same Focus Group, P2 stated, *'the main problem I have is the lack of money'*. FG2 P2 outlined his main problem to be the *'lack of money'*. Another participant in Focus Group 4 said *'my problems are caused because the lack of money'* (P1). This was the same response that P2 gave in this Focus Group. In Focus Group Five, the lack of money also appeared to be the biggest challenge. P 1 in this Focus Group said that *'I have many problems but my biggest one is that I am poor, I don't have any money'*. FG5 P3 responded with, *'money, that's the biggest problem'*. P 6 in this Focus Group stated *'I don't have any money; it is a problem to not have money'*.

The lack of money also emerged throughout the one-to-one interviews as the main problem. P 1 revealed *'I have several problems when it comes to money, my father has no job and can therefore not support me when I need money (...) I am married, although it is not official, but at times he is not able to financially help me and then as a woman it is hard to survive'*. P 2 stated, *'I am struggling because I*

*don't have any money*'. P 4 addressed his major problem in a louder voice and said: *'The problem! The problem is the lack of money'*. P 7 addressed his main problem as: *'The bigger problem is that I can't afford to buy anything as I don't have the opportunity for this'*.

Similar responses emerged from a question posed in the questionnaire which asked the participants about the difficulties they face. One of the questionnaire participants from another province wrote that *'there is a lack of many things, especially money'*. Another questionnaire participant from a rural district noted down a similar response, *'it is hard to survive here, it is expensive and I don't have money to buy things'*. Other questionnaire responses by participants from rural districts were: *'the lack of money to buy things'*, *'problems with money'*, *'the lack of money'*, *'for me the biggest problem is that I don't have money'*, *'a thing I don't like is my lack of money'*, and *'my main obstacle is that I find it difficult not to have money'*.

Mozambique's underdevelopment, as we saw above, is a result of the nation's history. Various authors like Ashcraft (1973), Geo-JaJa (1996), Mungazi, (1982), and Anamuah-Mensah (2000) refer to this history as 'colonial times.'

The main aspect that has contributed to today's poverty is the limited educational opportunities available during colonial times. The colonial power blocked the development of the national human capital, and thus stunted economic growth. Stewart (1996) outlined that without proper education, no human capital development can take place, and it is therefore more difficult for a country like Mozambique to develop its economic growth.

It is not only economic underdevelopment that led to the enormous poverty amongst the Mozambican citizens. As an effect of the Civil War, over eighty percent of the country had to be rebuilt. The newly created educational institutions were destroyed, and hindered the Government's efforts to decrease the illiteracy ratio amongst the citizens (Klees *et al*, 1997; UNESCO, 2000). In return, the supply of proper education hindered the development of human capital.

Authors like Moleke (2005), Sager (2005) and Szirmai (2005) argued that the type of employment open to people is linked to the development of human capital. The more skilled people are, the better their chances of employment. However, this research discovered that in Mozambique, the possibilities for human capital development have been low as a result of colonialism and the Civil War that followed. This is in agreement with Rodney (1982) who argued that the colonising powers blocked any form of

development in their colonies. Addison (1998) added that economic underdevelopment is also an effect of a Civil War.

This research outlined that the lack of human capital amongst the participants' families, as a result of the above mentioned aspects, caused their economic and social underdevelopment, as no stable employment has been found.

In order to analyse the magnitude of money-related challenges and to draw a clear picture of these, this theme is divided into two sub-themes, namely:

- Employment
- Financial dependents

#### 4.2.1.1 Employment

Clearly, the kinds of employment the participants' parents had access to determine whether and what kinds of financial resources they had access to. This section aims to outline the economic challenges revealed by the participants, which were caused by the type of employment that generates a family's income in the rural districts. The form of employment which provides the family with income was highlighted in the participants' questionnaire responses when they were asked how their family is sustained.

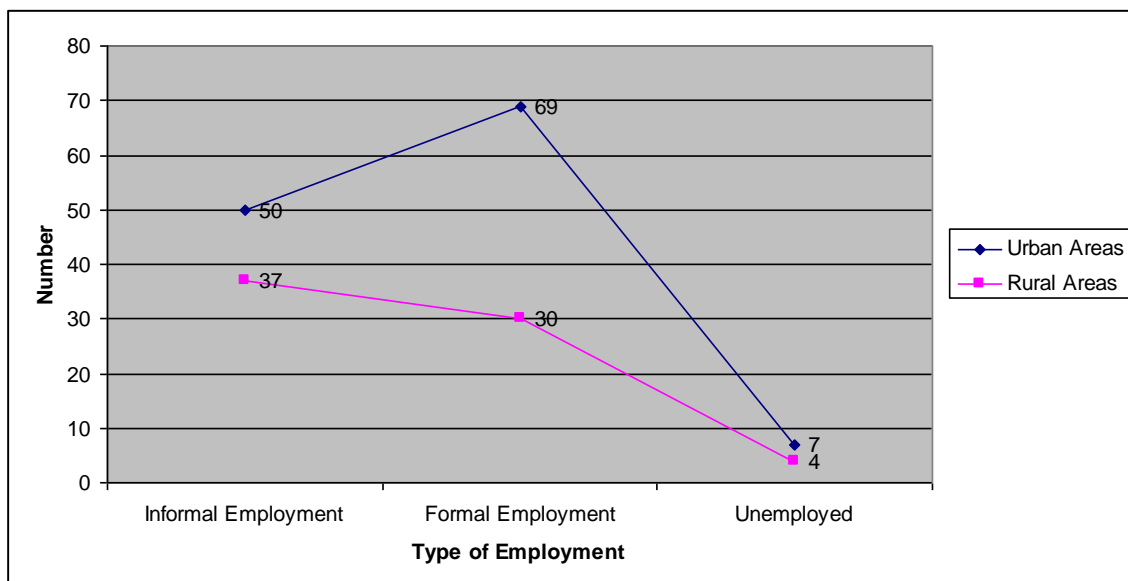


Table 2: Informal versus Formal Employment in Urban and Rural districts

The results identify the differences between the various fields of employment in the urban and rural districts. More importantly, it identified the percentage of unemployment in both rural and urban districts. Table 2 showed that unemployment in the rural districts is almost at the same level as in the urban districts, six percent and five percent respectively. Table 2 further presented that in the rural districts, most of the income is generated through employment in the informal sector<sup>3</sup> (52%), whereas in the urban districts, employment in the formal sector<sup>4</sup> generates the income of most of the participants' families (55%). In the urban districts, 40% generates their income through informal employment, whereas in the rural districts, 42% generates their income through formal employment.

The monthly income generated from informal employment<sup>5</sup> varies between '300 meticaiss'<sup>6</sup> and '500 meticaiss'<sup>7</sup>, with an occasional exception of '800 meticaiss'<sup>8</sup> in the urban districts. This is much lower in the rural districts where a domestic worker does not get paid more than '300 meticaiss', and a peasant, if able to sell and depending on the crop, will most likely earn between '100 meticaiss'<sup>9</sup> and '400 meticaiss'<sup>10</sup> a month. In the formal employment sector, monthly salaries, if paid, begin slightly higher. A secondary school teacher's salary in the urban areas varies from '600 meticaiss'<sup>11</sup> to '2000 meticaiss'<sup>12</sup> depending on the number of teaching hours. The salaries earned in other types of employment in the formal employment sector, in both the urban and rural districts, are unknown.

The salaries earned reflect the problems that relate to the payment of schools fees. With the low income in the rural districts it is more than obvious that the ability to pay school fees and other education-related necessities are problematic. The way in which school fees and other necessities affect the participants will be discussed in greater length later on in this chapter.

As previously stated, the lack of education and educational possibilities in the rural districts has influenced the development of human capital, and thus indirectly, the type of employment. In order to

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<sup>3</sup> Ihrig & Moe (2000) outlined the informal sector as a sector 'which produces legal goods but does not comply with government regulations', people involved in the informal employment sector often work individually and are not guaranteed a stable income. Informal employment mostly appears in the rural districts of developing countries.

<sup>4</sup> Formal employment is seen as employment within the formal economy (Hleksio, 2003), which provides the workers with some rights and a stable income.

<sup>5</sup> Unconfirmed data obtained through personal communication revealed the height of the average income in the various types of employment addressed in this research.

<sup>6</sup> 300 meticaiss is equivalent to \$11 ([www.xe.com](http://www.xe.com))

<sup>7</sup> 500 meticaiss is equivalent to \$19 ([www.xe.com](http://www.xe.com))

<sup>8</sup> 800 meticaiss is equivalent to \$30 ([www.xe.com](http://www.xe.com))

<sup>9</sup> 100 meticaiss is equivalent to \$4 ([www.xe.com](http://www.xe.com))

<sup>10</sup> 400 meticaiss is equivalent to \$16 ([www.xe.com](http://www.xe.com))

<sup>11</sup> 600 meticaiss is equivalent to \$23 ([www.xe.com](http://www.xe.com))

<sup>12</sup> 2000 meticaiss is equivalent to \$77 ([www.xe.com](http://www.xe.com))

be able to gain a deeper understanding of which fields of employment an income is generated in these **rural districts**, findings are presented in Table 3.

Type of Employment	District												Total
	Alto Molocue	Chinde	Gilé	Gurue	Ile	Inhassunge	Maganja da Costa	Milange	Morrumbala	Namacurra	Nicoadala	Pebane	
Peasant	6	1	2		2	1	4	4	1	8	2	3	34
Domestic worker				1			1						2
Carpenter					1								1
Teacher	2		2				3	1	2	3	1	5	19
(Project) Administration							1	1		1			3
Finance	1											1	2
Health sector										1			1
Transport	1		1										2
Other									1			2	3
Unemployed			1							1	2		4
Total	10	1	6	1	3	1	9	6	4	14	5	11	71

Table 3: Types of Employment in Rural Districts

As Table 3 above makes clear, in the rural districts, 34 out of 71 participants' (48%) family 'income' is generated through peasant-type employment. Despite the fact that being a peasant provides food a few times a year<sup>13</sup>, it is not recognised by the participants as official employment, as hardly any income is generated.

This was revealed by P1 who said '*my father is a peasant, he has no job*'.

FG4 P3 stated that '*my parents work on our Machamba<sup>14</sup>, but that does not provide any income*'.

P3 added: '*my dad is not able to help me he doesn't work, he is a peasant, and the food he needs for my family at home*'.

In seven cases (10%) the employment-related question was left unanswered, but the question on how the family is sustained without an income, was answered with '*machamba*'. In these seven cases, the

<sup>13</sup> Weather permitting. Due to natural disasters like floods or extreme heat, crops are ruined.

<sup>14</sup> A machamba is a piece of land, often located outside the town or village, which is used for crop growth. A machamba is especially for people who have low or no income, very little education and a low social position.

employment type has been categorised within the informal employment sector as peasant-type employment.

As Table 3 shows, 27% of the families generate their income through employment as a teacher. Despite the fact that this is seen, in this research, as employment in the formal sector, it does not provide the families with a stable income. As stated earlier in this chapter, salaries are often not paid on time or are not paid at all.

In the four cases (6%) of unemployment, the participants answered the question on the employment type that generates income, with '*no job*'. The additional question on how the family is sustained in case of unemployment remained unanswered.

It is not only the family income that influenced the available financial resources for the participants, but also the number of financial dependents it has to support. The more dependents there are, the less money there is available for things other than daily necessities, like food. The number of financial dependents in each participant's situation was the next issue that enabled me to explore the causes of economic underdevelopment amongst the participants.

#### **4.2.1.2 Financial Dependents**

Even if one is employed in the formal employment sector, it does not mean that there is always enough money to sustain a household. Many Mozambican families not only live with their spouse and their children, but often other family members and/or friends are part of the same household. This was revealed through the questionnaire findings. Many of the participants also shared their homes with uncles, aunts, grandparents, family in law or other community members. According to Ashcraft (1973) and Mungazi (1982), this results in socio-economic problems because as a result of economic underdevelopment, populations rapidly grow and more people are dependent on the same income.

This section highlights the relation between economic problems and household size. The number of dependents per household emerged from one of the questionnaire questions outlining the size of each participant's household in their district of origin. This research revealed that it is not only the direct family who is dependent on the income generated per household, but that 27 of the questionnaire participants (38 percent) also share a household with other family members and people other than family members. These statistics were extracted from a question answered by the participants living

with other household members other than his/her parents and siblings. The results that emerged are as outlined in Table 4.

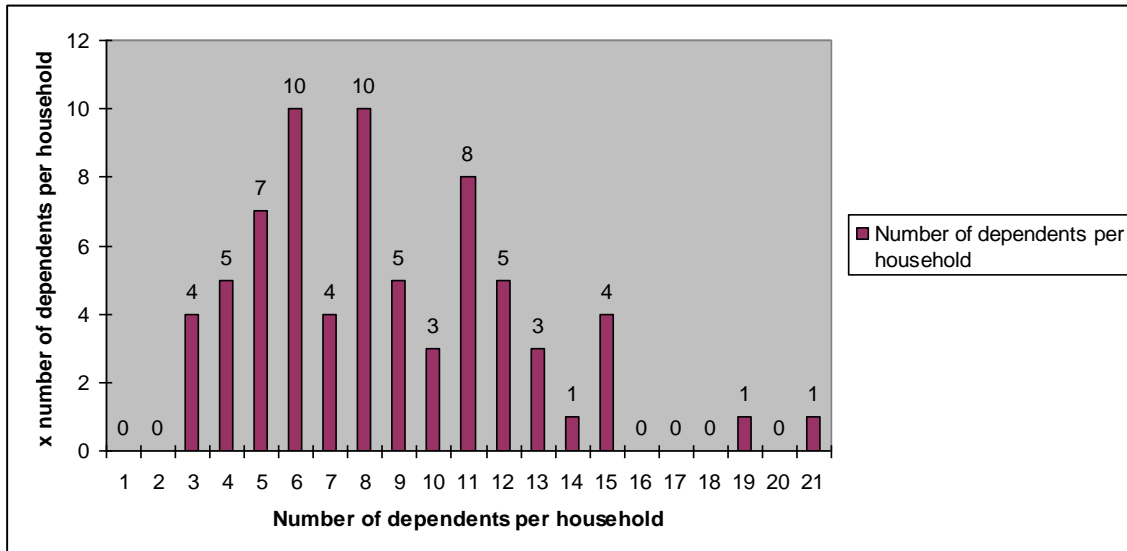


Table 4: Dependents per household in the rural districts

Table 4 shows that on average, the participants' household in the rural districts consists of eight persons. However, as shown in Table 4, 31 participants (44 percent) come from a household with more than eight dependents. This means that the limited amount of income has to be shared amongst a larger number of dependents, and as was revealed in the questionnaires, the participants with more dependents often had more people paying for their school fees and their necessities. The latter will be discussed in further detail in the section that follows in this chapter. As Participant 3 (P 3) said in the previous section of this chapter, the crops from the family's Machamba is used to feed the family. Despite the fact that in comparison to other participants the number of dependents in P 3's household is, with five dependents, below average, this participant emphasised that even with this 'small' number of dependents, the crops from the Machamba cannot be used to generate an income.

The sections on employment and financial dependents above outlined the grounds for economic underdevelopment amongst the participants and their families. These findings are at the foundation of the challenges that will be presented in the Educação section that follows.

## 4.2.2 Educação

This theme establishes a link between the Dinheiro theme and its impact on educational issues. It aims to delineate the challenges revealed by the participants in relation to education. The participants did not only have major hurdles to cross to find access to the school, but once having accessed the school, the challenges for the participants were not yet over. Various questions in the questionnaire and throughout the interviews revealed the problems they have had to deal with on a daily basis to be able to survive at the school. Educação first addresses the issues relating to access, followed by the challenges the participants face to survive at the school.

The economic underdevelopment status of Mozambique mirrors the underdevelopment of the education sector. It became clear when focusing on the Zambézia province that underdevelopment in the education sector is a huge issue, specifically in the rural districts. Many learners are still unreached (Klees *et al.*: 1997), resulting in a limited human capital development amongst people living in the rural districts. This is in agreement with the Ministerial Seminar (2005) which explains that in educational development, the rural districts are still overlooked.

However, as stated by the Ministry of Education (2004) more EP1 and EP2 schools in the rural districts of the Zambézia province have been opened in more recent years. Although this enables the rural Mozambican youth to start developing their skills, the older generation still 'feels' the effect of the slow developments of the past decades and can only hope that they will find the financial resources for them to develop their own human capital. In contrast to the increase of the EP1 and EP2 schools, there has not been any increase in the ESG1 and ESG2 schools in the province (Ministry of Education, 2004). This research showed that some of the participants' parents, guardians or caretakers would like the possibility to develop their skills and attend school. However, as one of the participants stated: *'my parents do not have the conditions to study although they would like to go to school'* (P4).

This statement stands in contrast to the EFA goals which outlined that access for young people and adults has to be established in order to meet their learning needs (UNESCO, 2002). In the Mozambican context however, access for adults has not been addressed in the EFA goals developed by the MEPT (Mario & Nandja, 2005) and therefore, the opportunities for adults to learn and develop their skills are very limited, as in the rural districts, no adult-focused learning environments have been established (MINED, 2004).

The ESG 2 cycle is in a similar position as adult-focused learning institutions. A limited number of schools (three) offer ESG 2 in the Zambézia province (MINED, 2004), and none of these schools are located in a rural district. The interview participants clearly addressed this by giving similar responses. A participant in Focus Group 5 said *'I am from Pebane there is no Grade 11 school there so I had to come here'* (P2). Another interview participant (P5) stated: *'There are only three pre-university schools in the province, and none in my district, but out of the three I preferred to come here'*. P 4 said *'there is no Grade 11 in the Gilé district'*. FG 2 P 1 stated *'I came to this school first of all because in my district there is no pre-university school'*.

Various questions posed in the questionnaire and the interviews made it possible to draw a clear picture of the challenges directly related to education. To be able to express the magnitude of these educational-related challenges, this theme has been divided into two main sub-themes:

- Access
- The Future

#### **4.2.2.1 Access**

The participants' responses showed that various challenges made it hard for them to gain access to the school. This section aims to bring into view the most common challenges the participants face, but it also addresses the minor challenges that emerged from this research.

All the interview participants (100 percent) described their main challenge as being economically related. This stands, as outlined in the previous chapter of this presentation, in strong relation to the type of employment that generates the family income. Within the formal employment sector, the income is significantly higher than within the informal employment sector. There is also a difference between the urban and rural areas within these employment sectors.

A challenge addressed by only one of the interview participants (P 1), but nonetheless an important one, is how the access procedure at the school is done. According to P 1 *'it is hard to get into the school. When you arrive you have to pull a piece of paper with a number. The higher the number the smaller your chance gets to get in. There are many people and not enough places available for everybody'*.

This appeared to prove that there is a real shortage of ESG2 schools and therefore a limited number of places for ESG 2 learners in the Zambézia province, as made clear in the data provided by the Ministry of Education (2004). This also confirms that the alternative scenarios and strategies developed by the Government to expand access are not addressing the transition problems caused by the decreasing number of schools going from one level to the next.

Another challenge addressed was the distance between the district of origin and that of the school, which was also outlined by the ADPESE & DPE (2005). P 4 said *'I would have preferred to go to Quelimane or Gurue but the distance was too far and the (financial) conditions did not allow me to travel all that way, so that's why I am here'*. This indicated that the challenges concerned with distance also have an economic dimension, as transport has to be provided to get to the school district.

Besides the challenge of distance, this research revealed that economic challenges play a crucial role in securing access to the school. It is not only the school fees, but also the transport and other necessities that need to be paid for. P 3 explained: *'The main problem I had to get into the school was getting the money together for my fees, but also for my transport to the district here'*.

A participant in Focus Group 2 stated *'it is not easy to access a pre-university school; this is because of the lack of economic conditions, the lack of money. The school costs a lot of money which you need to have to be able to access the school'* (P 2).

Another issue that arose as a challenge, (mainly gleaned from statistics that were provided by Provincial Education Department (DPE) and the analysis of the questionnaires) was the gender disparity in education. The UNESCO (2002) targets suggested that by 2005, the gender disparities should have decreased significantly. However, this research revealed the opposite. It exposed the fact that gender inequality is still an area of major concern, specifically focusing on the research school.

The economic background and gender disparities are delineated as the main challenges, and to be able to clearly analyse the extent to which these two aspects cause access problems, they were discussed separately within this section. The two sub-themes that discussed these challenges have been outlined as:

- Economic challenges
- Gender constraints

#### 4.2.2.1.1 Economic Challenges

The foundation of this theme links back to the employment section, discussed earlier in this chapter, in which it was suggested that there is an extreme lack of human capital development, especially in the rural districts of Mozambique. As stated, through this lack of human capital development, financial resources amongst the rural population are scarce. It is therefore hardly surprising that the major challenges the participants face are related to economic resources.

Throughout the interviews, the participants expressed desperation about the situation they face on a daily basis. P 2 said *'If I would leave here I only have one alternative which is to go back home. Even with the conditions I have to deal with I still prefer to stay at school. Sometimes I have money and sometimes I don't.'*

P 1 stated that *'where I am from I have a poverty certificate, but it is not valid here. I tried to get it valid but it is hard, it didn't work.'* P 1's statement verifies the position of the ADPESE & DPE (2005) which argued that it is not an easy task to obtain a poverty certificate as, "in order for this 'poverty certificate' to be issued, documentation such as a birth certificate, a document that few persons possess, is required".

Besides the expression of desperation as a result of poverty, the participants outlined three main challenges dealing with limited economic resources. These challenges were outlined as the payment of their school fees, the payment for their transport to the school district, and how to find money to buy school necessities. These three challenges will be individually discussed below.

#### **School fees**

It is important to note that at the time this research took place (October 2006); the annual school fees for ESG 2 were, at the school, '1500 meticais'<sup>15</sup>. Additional costs for uniform and other necessities are not included in this amount. Another '1300 meticais'<sup>16</sup> is added onto the annual fees for the accommodation at the boarding school.

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<sup>15</sup> 1500 meticais is equivalent to \$58 (www.xe.com)

<sup>16</sup> 1300 meticais is equivalent to \$50 (www.xe.com)

All twenty five interview participants, from both the one-to-one interviews and the focus group interviews (100 percent), identified their main challenge to school access as that of obtaining school fees. This reflects the participants' statements made earlier on in this chapter concerning their lack of money.

Table 5 outlines the people who are responsible for the payment of the interview participants' school fees. A distinction is made between formal employment and informal employment.

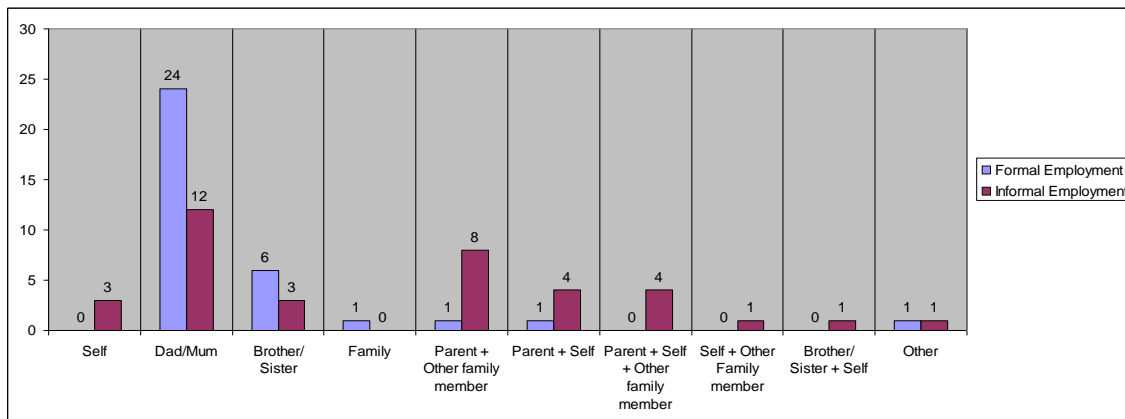


Table 5: People paying for school fees: formal versus informal employment

Table 5 clearly shows that when an income is generated through formal employment, the school fees are paid for by the family member who generates the family income (88 percent). It also shows that when the participants' family relies on an income generated through informal employment, often more than one person pays the school fees (49 percent).

The participants' responses mirror this. Some of the participants were more fortunate than others when it came to payment of school fees. This was especially the case amongst the participants whose family's income was generated through formal employment. FG 3 P 2 said *'my uncle is an administrator; he pays for my school fees and my transport'*. P 6 is in a similar situation: *'my father is with the police, so that's how he pays my school fees'*. FG 5 P 6 *'my father pays for my school fees, he is a teacher'*.

It is not always one of the parents who generate the family income, in nine cases (13%) of both formal and informal employment, the income is generated by either the participants' brother or sister and they pay for their siblings' school fees. This was confirmed by FG 2 P 1 who said *'my brother works as a project administrator, so he pays for me to go to school'*.

As Table 5 showed in the cases of informal employment, fees are in some participants' cases (49%), paid for by more than just one person, often other family members and community members. FG 5 P 5 responded '*My school fees are paid for by my uncle, myself and by friends in the community*'.

Table 5 also made it clear that in the case of informal employment, three participants (8%) are responsible for the payment of their own school fees, whereas none of the participants within the formal employment sector have to pay for their own school fees. It is only one participant in the formal employment sector who helps the parents to pay for school fees. This is significantly higher in the informal employment sector, where ten participants (27%) contribute towards the payment of their school fees.

This clearly indicates that the financial resources are scarcer in the rural areas and it is therefore not illogical that school fees are paid for with the support of others. As stated earlier, school fees are '1500 meticaï', and taking into account that in the rural districts a monthly income is on average '200 meticaï'<sup>17</sup>, this emphasises the financial difficulties participants from the rural areas face in order to cope financially at a school in an urban setting. Once the school fees had been accumulated, another economic hurdle the participants had to face was that of finding the financial resources to travel to the school district.

### ***Transport***

As discussed above, economic resources in rural districts are scarce. Once the resources for the school fees were found, then the hunt began to accumulate enough money to be able to afford the transport to the school district. Although this is a minor aspect that is often overlooked, it is important to address the distances the participants had to travel to find access to the school.

Despite the fact that this topic was only focused on by eight participants (32%) throughout the interviews, it is important not to overlook this as transport, especially from districts far away, is not cheap.

P 1 said '*It is hard for me and my family to arrange to money for my transport there and back*'. P 2 gave a similar response to P1. He said '*it is very difficult to arrange money for transport as is costs a lot of money*'. P 2 continued and stated that the costs of transport between his district (Mopeia) and the

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<sup>17</sup> 200 meticaï is equivalent to \$8 ([www.xe.com](http://www.xe.com))

school district were at the time of research '250 meticaïs'<sup>18</sup>. P 4 in Focus Group 4 said that his friends pay for his transport to the school district, whereas the transport for FG2 P2 is being paid for by his uncle.

Though as stated before, transport was addressed as being a problem in relation to being able to access the school, not many participants expressed their concerns about transport. A main concern besides the school fees was addressed by all 25 interview participants, who all agreed and found it complicated to be unable to afford the necessities for school.

### **Necessities**

From the interviews, it appeared that once having accessed the school, the lack of financial support caused various problems. These problems were identified as lacking the financial resources to buy the necessities needed for school. Out of all 25 interview participants, 100% said that once having accessed the school, they feel limited as they do not have the financial resources to buy school books, note books or even a pen.

An interview participant (P 2) said that by not being able to afford any school necessities he feels that he can not participate in the classroom properly or learn the covered subjects at school. P 4 adds *'my biggest problem is money; I can't afford to buy a note book, so when the teacher writes something I can often not copy it because I don't have a piece of paper to write on.'*

When the question on how the participants survive at the school without financial resources was asked, it turned out that four participants (16%) try to solve this by looking for some kind of employment throughout the school year or during school holidays.

P 2 said *'to be able to buy the necessities like photocopies or a note book I often do not have money, but I try to get some by selling home made traditional alcohol. I find it hard to get my daily food together, if I don't have money I don't eat and I sacrifice. This also influences my school performances. I live with that I sometimes don't have money and sometimes I have'*

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<sup>18</sup> 250 meticaïs is equivalent to \$10 ([www.xe.com](http://www.xe.com))

P 1 adds *'Most of the time in the holidays I try to work so I can get some money together for my school fees and other necessities, but it is hard to find work'*

This section clearly established that economic challenges are the main hurdle the participants have to take before they can even think of trying to access the school, or any school. Specifically for the participants from an economic background in the informal employment sector, this challenge plays a far more crucial role than for the participants where the income is generated through means of formal employment. Another issue that is of main concern is gender inequality. The questionnaires showed that out of all the siblings, more boys attend school than girls. This result stands in agreement with ADPESE & DPE (2005) which stated that girls are often kept out of school for domestic work, premature pregnancy or marriage, or the parents' perception about girls travelling a long distance and attending school away from home. The following section focuses on the gender constraints that arose in this research.

#### 4.2.2.1.2 Gender Constraints

The purpose of this section is to establish a relationship between the gender differences amongst the participants, the gender differences in the participating classes and at the school. The statistical results obtained through the questionnaires showed a worrying difference between the number of boy participants and the number of girl participants. These results are as outlined in Table 6.

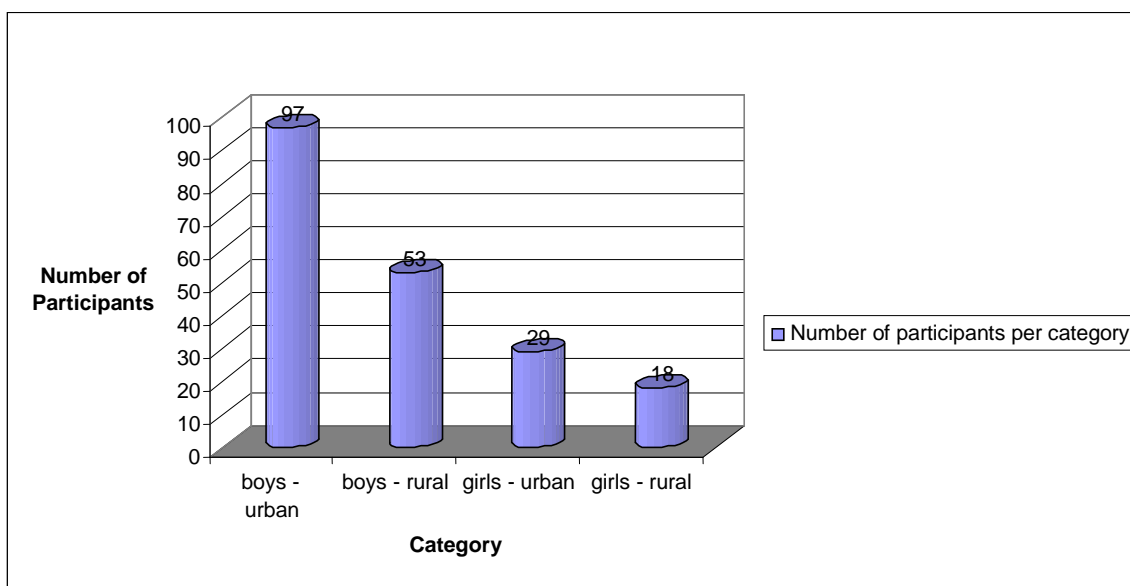


Table 6: Gender analysis of participants from urban and rural districts

Table 6 showed a significant difference between the number of boys and the number of girls from both the urban and the rural districts. Out of the 197 questionnaires, only 47 (24%) were answered by girls, of whom 18 (38%) come from rural districts. Further, when focusing on the rural districts, it shows that 75% of the rural participants are boys. This significant difference mirrors the gender inequality in the participating classes which is outlined in Table 7.

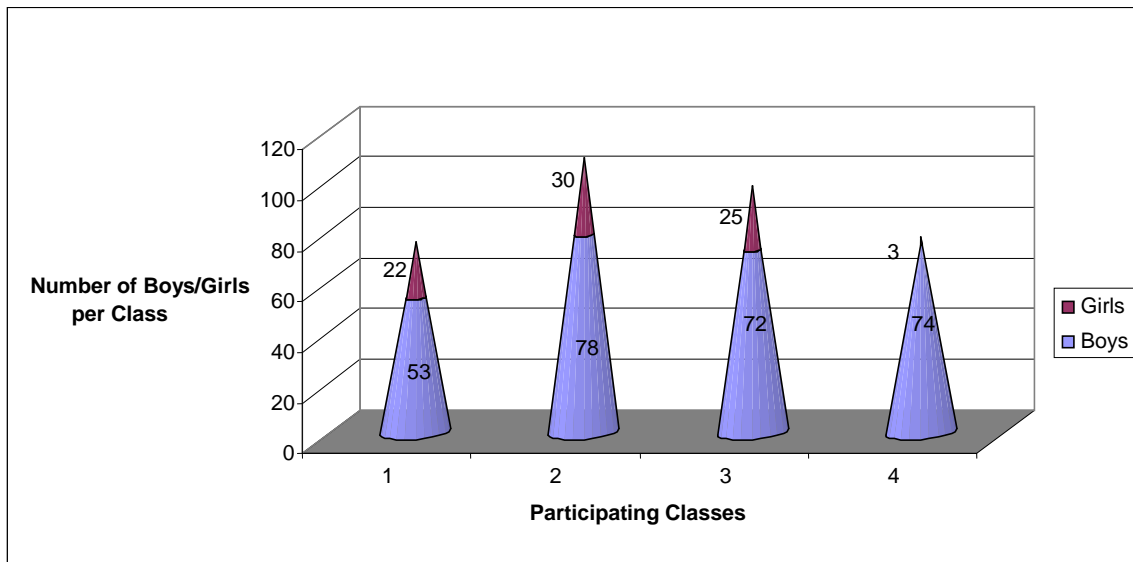


Table 7: Gender Difference in Participating Classes

As in Table 6, where the gender inequality amongst the questionnaire participants was shown, Table 7 shows the gender disparity in the participating classes. Table 7 clearly shows that in classes 1 and 2, which is the social cycle; the percentage of girls is higher than in the more technical cycles (classes 3 and 4). In Class 1, 29% are girls, which is similar to the percentage of girls in Class 2 (28%). This is different in Class 3, in which 72 (74%) out of the 97 learners are boys, and in Class 4, the gender inequality is even higher with only 3 (4%) girls in this class.

To be able to sketch a better picture of the gender inequality from a larger perspective, a closer look has been taken at the gender differences at the school in the ESG 2 cycle. These outcomes are presented in Table 8 and outline the transition percentage at the school from Grade 11 to Grade 12.

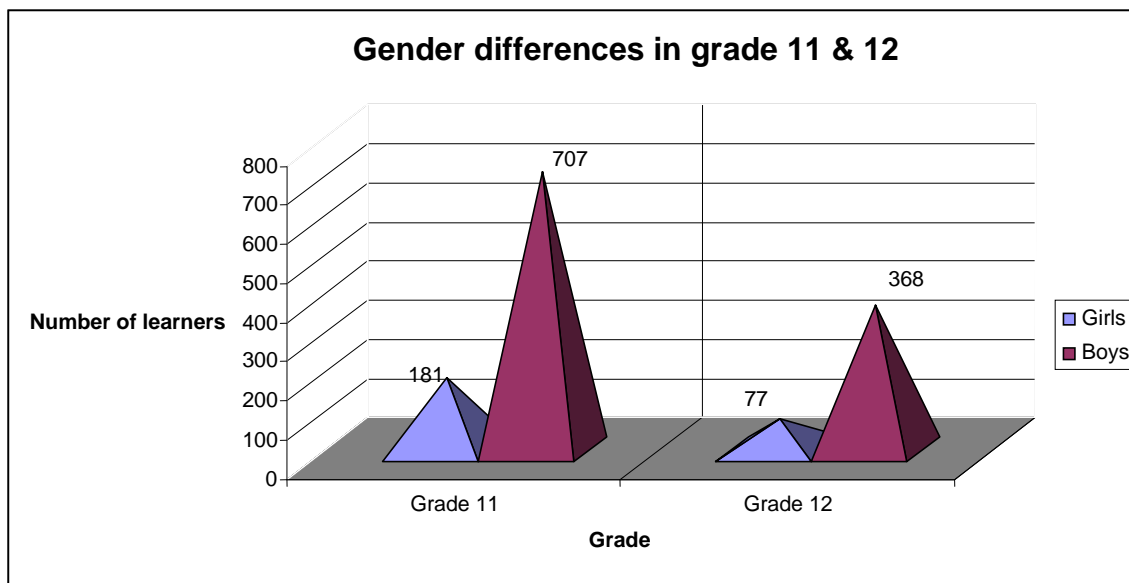


Table 8: Gender Difference in the ESG 2 Cycle at the School

Table 8 shows that there are a total of 888 learners in the 11<sup>th</sup> Grade at the research school. Of these, there are only 181 (20%) girls, of whom 26% (47 girls) were amongst the questionnaire participants. Ten percent of the total number of girls in the 11<sup>th</sup> Grade, are participants from the rural areas. Out of the 888 learners in the 11<sup>th</sup> Grade, 707 are boys (80%). The gender inequality is slightly higher in the 12<sup>th</sup> Grade as 368 (82%) out of the 445 learners are boys.

Focusing on the transition from the 11<sup>th</sup> to the 12<sup>th</sup> Grade, it can be concluded from Table 8 that, for both the boys and the girls, there is a decrease in the number of learners in Grade 12. Only 34% (368 learners) of the male learners in the ESG 2 cycle are in Grade 12. This shows a significant decrease in the number of male learners during the transition from the 11<sup>th</sup> Grade to the 12<sup>th</sup> Grade. The percentage of girls (77 learners) in the 12<sup>th</sup> Grade is 30% of the total number of girls in the ESG 2 cycle at the research school.

Specifically looking at the transition, Table 8 emphasises the comments the participants made about their future. The participants stated that they are only able to continue to the 12<sup>th</sup> Grade if there are enough financial resources available. This will be expanded on in the following section.

This research also revealed that it is not only the statistical information that was generated on this specific theme that showed gender constraints, but it was also shown by two of the female interview participants who expressed typical gender-related issues. Despite the fact that these addressed issues can only relate to the social dilemmas of their living situation, it does show that these girls face other

day-to-day living problems than the boy participants outlined throughout this research. The problems addressed by the girl participants will be expanded on in the section about the participants' living conditions.

#### **4.2.2.2 The Future**

So what plans did the participants have for their future? Despite all the challenges they faced to gain access to Grade 11, most of the questionnaire participants (70%) stated that they would like to continue their ESG2 career and move on to the 12<sup>th</sup> Grade. Out of the 49 who expressed that they wanted to finish ESG2, 37 (76%) stated that they would like to continue studying after completing ESG2. Various participants however, added that the continuation of their educational development depended on their financial circumstances.

Two participants whose financial resources are obtained through peasant-type employment said: *'I would like to prepare myself for a better future, but it depends on my situation'* (P 1). P 2 pointed out *'I would like to continue studying, but I don't know if the conditions allow it. I am hoping for the opportunity to continue to the university, but I know that the opportunity doesn't exist'*. However, P 7, whose family income is generated through formal employment, stated *'after I finish ESG2 I would like to continue studying to become a teacher, I hope I can'*.

Another participant, whose family generates its income through formal employment, responded more positively than others with respect to his future plans. *'I would like to finish grade 12 as well (...) and then go to IMAP and become a teacher'* (P4).

One participant, despite the fact that the income is generated through informal employment, said that *'my future plans are to continue studying and become a functionary'* (FG 3 P2).

Some of the interview participants expressed a preference for accessing Grade 12 in one of the two other districts offering ESG2. This is a result of the educational-related problems at the research school.

The next section - Educational Problems and Benefits - focused on the problems addressed by the participants, but in contrast, it also outlined the benefits of the participants to be in Grade 11 at the research school.

#### **4.2.2.1 Educational Problems and Benefits**

All interview participants and some questionnaire participants highlighted the same educational problems. These problems related to the quality of education through the means of resource availability, and some addressed problems relating to their teachers. Another problem that emerged was linked to the underdevelopment of education in the Zambézia province, which focused on the insufficient number of schools.

FG 5 P1 said *'I had to come to this school as in my district I had no possibility to continue as there is no school there offering Grade 11'*.

Despite these problems addressed by the participants, some stated that there were benefits to attending the research school, but often this is related to the actual town in which the school was established.

P 2 stated *'the benefits of going to school here are that I am learning many new things which I did not learn before at the school in my district'*.

The limited availability of resources appeared to be caused by the lack of financial resources from the school and the local education authorities. As a result, participants felt that due to the limited resources available to them like books, their educational development was being delayed.

Other problems which are often the result of colonial times, were not addressed by the participants, but were observed throughout some of the interviews. During the 'colonial time' the language of communication changed into Portuguese. Despite the fact that the participants grew up with Portuguese as a means of communication, some of the participants from the smaller rural districts (P 4) were not as fluent in Portuguese as they should be. Jarrett (1996) argued that due to the replacement of the traditional language with the colonial language, human development problems occurred.

### 4.2.3 Social dilemmas

The challenges highlighted in this theme emerged through questions posed in the questionnaires and the interviews about the participants' living situation whilst attending school, and about their feelings of being away from their family and their home. It brought into relation the effects of economic underdevelopment on the social life of the participants. Addison (1998) outlined that underdevelopment does not only result in economic problems, but many social problems also appear.

A main social dilemma that emerged from the questionnaire dealt with the circumstances of the actual town. This arose when the participants were asked about the disadvantages of living in the town where the school is based. Out of the 71 questionnaires answered by participants from rural areas, 48 (68%) expressed their dissatisfaction with the lack of water in the town. The responses varied from '*I don't like it that I have to bath in the river because there is no water in the town*', to just '*there is no water*'.

Another social problem that occurred was the fact that the participants felt lonely being away from their family. The loneliness will further be discussed in greater detail later in this section.

The social problems that arose are of similar scope and mainly relate to the living situations of the participants and the consequences of this. To be able to analyse the impact of the social challenges addressed by the participants, this theme has been divided into two sub-themes which will be discussed in the following sub-themes:

- Living
- Alone

#### 4.2.3.1 Living

From the questionnaires and the interviews, it emerged that most of the participants either live at the boarding school (37%) or with their family (42%), and some stay either with friends (17%) or alone (4%). The question posed to the participants' focused on both their living situation and their living condition. The living situation of the participants from the rural districts is as outlined in Table 9.



Table 9: Participants' Living Situation

Table 9 indicates the living situation of the participants throughout the school year. It shows that out of all the participants from rural districts (71) 37% live at the boarding school, 42% live with family, 17% share a place with friends, and 4% stay alone.

One of the participants however, had planned to stay at the boarding school, but as there were only a limited number of places available (300) there was no place for him. An alternative was then not easy to find, as he explained: *'when I got to the boarding school there was no place for me, I was lucky that after a few days a friend asked me to share a house with them'* (FG5P1).

Most of the participants living at the boarding school outlined similar challenges. These challenges were not only money related, but the lack of water and the limited diet were also causing them problems.

P 4 said *'I live at the boarding school, when I arrived I didn't know anybody so I had no choice that's why I am staying at the boarding school'...* *the main problem at the boarding school is the diet. It is often there is not enough food to prepare for all the students at the boarding school, so we do not eat every day.'*

FG 2 P 2 added *'the main problem for me at the boarding school is the lack of water'*

Another type of accommodation available is staying with family who live in the town. From the responses, it emerged that living with family also brings about certain problems. However, these

problems do not seem to be as severe as the problems the participants at the boarding school outlined. The problems addressed by the participants staying with family, both girls, expressed problems with the male person in the family. P 1 said *'I live with my family here, but it is hard. I don't know them well and the husband is the boss in the house. His wife always agrees with him, and if she doesn't she tells him. I found it hard to say something when I don't agree, I am scared. I don't want to live here if I can continue to next year, but I don't have another option'*

P 3 of Focus Group 5 stated *'I live with my uncle, my father's brother. If I have money he takes it. It is hard as I can't confide in my aunt about this. Because of this I hope to go back to my family back at home, this is my last year here I don't want to stay longer'*.

Table 9 shows: that nine participants (13%) live with friends, and that three participants (4%) stay on their own. The reason for staying with friends or alone was addressed during the interviews. As mentioned above by FG 5 P2, it became clear that he planned to stay at the boarding school but that due to a limited number of available places this was not possible. Staying with friends does not mean a stable place to live, and this can be concluded according to what P 2 said: *'I live with two friends who also go to the same school, they are in grade 9 and 11, and if we can't pay rent we try and move to another place'*.

This section showed that the living conditions of the participants are also affected by their economic underdevelopment. It did not only show the economic related problem, but through the interviews it became clear that the participants also have social problems. One of these problems is the loneliness they feel by being away from their family at home. The following section will outline the loneliness of the participants in further detail.

#### **4.2.3.2 Alone**

This section aims to outline how the social situation of being away from home affects the participants' lives at the school. It became clear that most of the participants feel alone, as circumstances only allow them to see their family once a year, if they can find the financial resources to travel at all.

From the questionnaires, it emerged that 33 (46%) out of the 71 participants found that living away from family is a disadvantage of being at the school.

Some of the interview participants had a change in voice when the question was posed on how often they saw their family at home. It was clear that being away from home affected them emotionally in a negative way.

P 2 said in a lowered voice *'I don't visit my family at home often, it is very hard but it is too expensive (...) I am happy I have friends here, I enjoy studying here, but what I don't like is being so far away from my family'*.

FG 5 P 1 pointed out *'I don't have any possibility to communicate with my family or see them at home, the distance is too long'*.

This theme established a clear distinction of the relation between social and economic challenges. From the participants' responses, it became clear that not having money affects them socially as often their living situation could be improved once there are more economic resources.

The minor theme that emerged is health, which is also economically-related and was addressed by the participants residing at the boarding school. This theme will briefly be covered below.

#### **4.2.4 Health**

Despite the fact that the Health theme only appeared in some of the participants' responses, it is important to highlight the aspects that emerged. The district where the school is based has a rural hospital. It is currently being developed by the European Union (EU), but it is still short of the equipment which is a necessity for a hospital.

Malaria is the number one cause of death, followed by HIV/AIDS. Malaria tests are the most common tests done at the hospital. Daily, long queues of people wait outside the 'test room' to be tested for malaria. Only basic malaria treatments are available at the pharmacies and are not always in stock.

To outline the challenges the participants come across, this theme has been divided into two small sub-themes which refer to the participants' financial resources and to the circumstances at the boarding school. The themes that emerged are:

- Dinheiro
- Contagious Diseases

#### **4.2.4.1 Dinheiro**

As in the other themes, money plays a crucial role for the health issues of the participants. From the participant's responses to these issues, it emerged that their main problems are to find the money to either: go and see a doctor when sick, or to visit one of the pharmacies to buy the required treatment. Due to cultural differences, some of the participants try to find their way back to their district of origin to be treated there.

#### **4.2.4.2 Contagious Diseases**

Malaria is not contagious, but many other infections or viruses are. During the interviews with some of the participants who all live at the boarding school, it became clear that due to the number of learners sharing one dormitory, 'eighty' as stated by P4, contagious viruses spread easily.

P4 continued *'If one of the learners gets sick, soon others will be sick too'*.

P5 adds *'if we are sick we go to the pharmacy, but it happens often the pharmacies do not have the medication we need, so we then need to wait for the medication to come in. We miss a lot of school then and other friends at the boarding school get sick too. Because of the bad diet at the boarding school it is also not easy to recover from illnesses'*.

This section focused on the last access challenge that was revealed through this research. How these discussed challenges stand in relation with the economic underdevelopment in Africa and in Mozambique will be analysed in the following section. The following section, which presents a summary of the findings in relation to economic underdevelopment, focuses on the characteristics of economic underdevelopment as argued in the literature. It will then provide a link to the characteristics of economic underdevelopment in Mozambique that emerged through this research.

### **4.3 Summary of Findings**

This study has focused on the socio-economic and access-related challenges learners from rural areas face in accessing the ESG 2 cycle of the Mozambican education system. Through the identification of these challenges and the analysis, it is clear that the major challenges these learners face can be defined as socio-economic challenges.

The participants were in agreement with each other about the main challenges they faced in gaining access to the school. The data emphasised the economic and socially related problems the learners faced whilst trying to find access to the school and also the challenges they face once having accessed the school.

The economic underdevelopment experienced by the families is caused by the limited educational opportunities they have access to in the rural districts. As a consequence of this, many Mozambicans, especially in the rural districts, are forced to depend on their own self-developed skills, which often do not reach further than very basic levels and do not enable them to develop human capital. Informal employment - jobs such as being peasants and domestic workers – are, as a result, often unavoidable. But they do not, however, produce a viable livelihood and provide the means to survive effectively in the new conditions of Mozambique. The foundation of the problems experienced by the participants, thus go back to the deep and circular nature of under-development in the region. Education and economic development are tightly bound together.

#### **4.3.1 Economic Underdevelopment in Mozambique**

This research suggests that economic underdevelopment in Mozambique, just as it is for the rest of the continent, is characterised by a number of features. As Anamuah-Mensah (2000) has argued, for Africa these are poverty, malnutrition, illiteracy, and disease, amongst other aspects. Other writers (Bacchus, 1980; Lindsey, 1975; Mungazi; 1982) argued that the cause of economic underdevelopment can be traced back to colonial times. This is evident too in Mozambique's situation where the country's problems can indeed be traced back to the way in which the population was organised, or indeed disorganised, during the colonial period. It can be argued that during colonialism, traditional, political and educational values were destroyed. Illiteracy, which was caused by the limited educational opportunities for the citizens as education systems were imported and focused on the production of low level employees (Geo-JaJa, 1996), limited human capital development took place. Another cause of the

enormous illiteracy was the use of Portuguese as the main language of communication. This resulted, specifically after independence, in citizens not being sufficiently skilled to be able to sustain a livelihood. Through the lack of human capital development informal employment-type was often the only solution to generate an income. This however, does not provide a stable income, and, in turn, leads to various problems, such as malnutrition.

#### **4.3.2 Economic underdevelopment in Education**

The lack of development in the Mozambican education system can be characterised by distinctive aspects. These can be described as:

- low quality of educational institutions
- limited availability of educational institutions
- limited availability of resources
- gender inequality

Despite the fact that priority has been given to quality and equity development as argued by UNESCO (2002), this research has shown another picture. Quality and equality have to be established in alignment with the EFA goals. However in the Mozambican situation, as described in this research, firstly the quality of educational institutions is inadequate. This can be seen as an ongoing result of the colonial period in which the indigenous system was destroyed and replaced by an education system designed to suit the Portuguese colonisers in their efforts to discourage Mozambicans from becoming educated in a way that they would become an indirect danger to the colonial position of the Portuguese.

The effect of this history is that the Mozambican education system is not presently able to deal with the challenge of providing its citizens with skills needed to compete in today's globalised world. Moleke (2005), Sager (2005) and Szirmai (2005) argue that to be able to establish an economic growth agenda that can make one competitive in today's globalised world, improvement has to take place in the skills development of the citizens. Through this skill improvement, a stronger human capital base can be established which could lead to a stronger economy. There are however, simply not enough schools in the system today to make this a realistic dream for Mozambique. This is especially so in the ESG2

cycle where the number of available institutions is, in comparison with the ESG1 cycle, extremely low. This results in the 'fight' with other learners to access these limited ESG2 schools. As statistics have shown (MINED, 2004), approximately 20 percent of the ESG1 graduates can be placed in the ESG2 cycle.

Another aspect that decreases the quality development is the lack of properly trained teachers, but is also characterised by the lack of available resources. Without adequate and updated resources, an education system cannot function or develop in such a way that underdevelopment can be avoided.

Another characteristic that was revealed through this research is the gender inequality in the Mozambican education system. Despite this being one of the main focuses of the EFA goals in relation to the national education system; it is far from being equal. This research showed that especially as the level of education progresses the boys/girls ratio decreased significantly.

# CHAPTER FIVE

## CONCLUSION

The aim of this study was firstly to gain a deeper understanding of what challenges learners from rural districts face to access the 11<sup>th</sup> Grade in the ESG2 cycle. Secondly, this study looked at the challenges these learners face to survive once having accessed the school.

This chapter focuses on the implications of this research on the available literature on underdevelopment, and on underdevelopment in relation to education. After this discussion, practical recommendations are presented for the various educational levels within Mozambique.

### **5.1 Conclusion**

This research, mostly confirmed the main findings that emerged in the general literature on underdevelopment. Specifically focussing on underdevelopment in education, this research showed that after the colonial period, a rapid growth of educated citizens was necessary to develop a country like Mozambique in its own way instead of continuing to follow the former colonial systems. As discussed in the introduction of this dissertation, the Mozambican Government aimed to improve the education system by focussing on the various layers of the education system.

Despite the fact that this improvement did help to develop human capital, this research clearly established that there is still a major lack of education in the rural areas which disables any form of human capital development. This lack of educational opportunities plays an enormous role in the ways that income is generated, which is particularly significant for the rural areas focussed on for this research. This study has thus confirmed the overall findings of the general literature drawn on for this study. What is new in this research is the elucidation of under-development as a lived experience. This lived experience of underdevelopment has been outlined through the results of this research.

The lived experience of underdevelopment was elucidated in this research by the participants who as individuals outlined their problems. This showed that these problems, from an economic perspective, were linked to underdevelopment. It emerged as a complex experience as it does not only involve the participants, but it also involved their parents and other family and/or community members.

This complexity was firstly addressed by the economic background of the participants, which was linked to their employment situation. The employment segment of this research established a clear picture of the burden of school costs for families from the rural areas, in relation to the income received by the participants' families. The picture that emerged is that the economic situation of a family is worsened by the burden of having to pay school costs. This research showed that school costs can be compared to an income generated over a period of two to four months.

Secondly, the social disparities revealed the complexity that again confirmed the underdevelopment of the Mozambican education system which surfaced during the research findings and addressed the dependency of the participants' living situation whilst attending the school.

Lastly, a fact which was also indirectly addressed through the economic and social issues is the fact that education opportunities amongst the rural population are not 'just' decided on but constitute the subject of intense deliberation in families. This research showed that it is not only a process of finding the right resources, but that the decision to provide a family member with an educational opportunity, other than primary education, is taken carefully. In the present, this decision means more financial struggle; however, as most participants anticipated, they want to support their families through their education by developing their human capital. In this context, underdevelopment must be understood as a complex social space about which a great deal more research is clearly needed. It involves incredible sacrifice on the part of families, but also an acute awareness of how they might begin to shift their circumstances in the long run through education, if their human capital development does not fail to find traction with their lives and that of their communities. It has not been the purpose of this study to focus on the ways in which communities in economically under-developed economies deal with the challenge of improving their lives, but it is a conclusion hard to escape.

Throughout this research, access-related issues were addressed, a question which has not been significantly attended to in the general literature as discussed in this dissertation. This research has attempted to add this dimension to this literature. Through the analysed empirical data, a clear picture emerged of the nature of the struggle which rural people go through to access certain levels of secondary education in Mozambique. This was not found in the general literature on underdevelopment, as this literature did not show what efforts people make to find access to education for themselves or their families. An important new element in this process, adding to our general surfacing of the agency factor in under-developed situations, is the role of the learners themselves and

their daily struggle of underdevelopment. The study showed that the participants did their utmost to continue studying and the degrees to which they went to sustain themselves, and it also addressed the critical situation in which some of the participants find themselves, economically and socially. The agency factor is an important issue to have come out of this work.

In contradiction to the literature reviewed in this dissertation, in which it becomes apparent what structural challenges children and their families come across in terms of underdevelopment, this research established a clear picture on how the children and their families engage these structural realities. It is important to note that the framework for this research, based on underdevelopment, is a very structuralistic and deterministic way of seeing the world but that it did not reflect on the day-to-day reality with which children and their families are confronted. This research showed that these families respond to these theoretical structures and take initiatives accordingly. The startling initiatives one sees in this study are not only the ways in which families' bond together to sacrifice for their children, but also the mentioned efforts the children themselves go through regarding the generation of some kind of income to survive.

To conclude, this research has not only contributed to the extension of the literature on underdevelopment by providing proof of underdevelopment as it is in the living situation, but it has also expressed the underdevelopment in the Mozambican ESG2 cycle with a straight focus on the Zambézia province. This is indirectly linked to the literature on the underdevelopment of education with the implications for the underdevelopment in education in the Zambézia province, but also indirectly for the Mozambican education system.

## **5.2 Recommendations**

The solution, one would think, is to increase the number of ESG2 schools throughout both the urban and the rural areas. However as this research revealed, Mozambique is constantly facing the problem of economic underdevelopment and therefore the learners face underdevelopment in their every day life. The recommendations, after concluding this research, could therefore be twofold. It could be said that it is significant that there are not enough ESG2 schools in Mozambique, particularly in the rural districts, but also underdevelopment as such needs to be addressed.

Thus, it could be that the only way Mozambique is able to increase the number of educational institutions, is with the much needed financial support of external donors. With this financial support, it is not only that the number of educational institutions can be increased, but it will also support Mozambique indirectly by developing economic growth as more learners can be placed at different institutions. Also through the establishment of more institutions, more teachers are needed and therefore better teacher training colleges are required. If financial aid is spent properly, the establishment of more educational institutions can be a significant development for economic growth. By providing more educational institutions, more teachers are needed, and therefore more citizens will be provided with better skills and develop their human capital. Another positive development would be the increase of job opportunities within the formal employment sector.

By providing more citizens with education, the human capital will be expanded on and as a result, more citizens will be able to support Mozambique in the future, with a stronger economic growth which is more likely to be able to sustain competition on the global economic market.

Despite the fact that through the establishment of more educational institutions the economy will start to grow, this is only achievable (as stated earlier on) with the support of external funding. School fees cannot increase significantly as unaffordable school fees will negatively affect enrolment ratios. As this research has shown it is, for rural communities, paying the school fees is often a struggle. Focussing, from a national point of view on improving the current state of underdevelopment and ensure that both the rural and poor communities do not have to spend their little money on accessing school which ultimately does not serve the local economy nor develop the kinds of skills that they need.

This case study has provided insights on one of the ESG2 schools only. However, before the above recommendations can be put into practices, it is important to further research the area which this study has focussed on. Through further research, the location of the educational institutions can be decided upon, but also to be able to overcome and resolve the social living challenges revealed by the participants as a result of underdevelopment, a solution needs to be found.

## CHAPTER SIX

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# APPENDIX I

## QUESTIONNAIRE QUESTIONS

The following questions were asked in the questionnaire handed out amongst the participants. The questions were asked in Portuguese and for this appendix translated into English.

<b>Questionário para Escola Secundaria de Mocuba:</b>				
<b>Name</b>				
<b>Class</b>				
<b>Student number</b>				
1. Where are you from?				
name of province				
name of district				
name of city/village				
<b>Please answer the following questions about your family:</b>				
2. Who lives with you in your family house	Father	Mother	Brother	Sister
	Grandfather	Grandmother	cousin (m)	Cousin (f)
	others, who:			
3. Who is the breadwinner in the family?	Father	Mother	Irmão	Irmã
	others, who			
3. A. What work does the breadwinner do?				
3.B. If there is no breadwinner how is the family supported?				
4 Does your family have an empregada?	Yes	No		
5. How many brothers do you have?				
5. A. How many brothers go to school?				
5. B. Where do they go to school?				
5. C. What kind of school do they go to?	Primary	Secondary	Other, which	
6. How many sisters do you have?				
6. A. How many sisters go to school?				
6. B. Where do they go to school?				
6. C. What kind of school do they go to?	Primary	Secondary	Other, which	
<b>If you are not from Mocuba please answer the following questions</b>				

7. Is there a secondary school in the area you are from?	Yes	No	
8. Who decided you should come to school in Mocuba	Father	Mother	Myself
	others, who		

9. Do you think the school in Mocuba is better than a secondary school in your area	Yes	No
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10. Where do you live during the school year?	Boarding	with family	with friends
	Somewhere else, where		

11. Who pays for your school fees?	Father	Mother	Myself
	others, who		

12. What do you like about living in Mocuba (please write something about it)	

13. What don't you like about living in Mocuba (please write something about it)	

14. How often do you see your family a year?		times
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15. What do you see as most important benefits of going to school in Mocuba? (please write something about it)	

16. Was it easy to access school away from home?	Yes	No
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17. What do you want to do after finishing secondary school?	

**THANK YOU VERY MUCH!!!**

## APPENDIX II

### INTERVIEW QUESTIONS

The following questions were used as a guideline throughout the interviews and the focus group interviews. In each of the interviews these questions were asked to the participants.

1. Who do you share a house with in your home district?
2. Who in your household generates the main income?
3. What job does the person responsible for the income do?
4. How and by whom are your school fees & living costs paid for?
5. Is there another pre-university school close to where you are from?
6. What made you decide to come to the school here and not the other 2 schools offering Grade 11?
7. Can you please explain what problems you faced to get access to the school?
8. Can you please explain what problems you face whilst being at school?
9. What are, to you, the benefits for going to this school?
10. Do you find it easy to access a pre-university school? Please explain further to support your answer?