Linnéuniversitetet Kalmar Växjö

# EDUCATION SERVICES FOR CHILDREN WITH SPECIAL EDUCATIONAL NEEDS IN ZAMBIA

## A HUMAN DEVELOPMENT AND CAPABILITY APPROACH


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## Abstract

Children with special educational needs (CSEN) are exceptional learners. They are not handicapped, but merely living with a disability of one kind or the other. Handicaps are the disadvantages faced when society does not enable them to fulfil their lives. Idioms such as *children are the future generation* or *the leaders of tomorrow* are common and overly used today, hence the need for greater and more nuanced effort in preparing them for future responsibilities.

Implementing education services for children with special education needs in Zambia comes with challenges. The predicament of diversity among various learners in Zambia is evident as the results of this study illustrate. The lack of a child database, nature of disability and distance from school, apt learning materials and choice of school placement are some of the issues educationalists and parents have to deal with in making education participation possible for exceptional learners.

Informed by the transformative philosophy and the theory of Social Inclusion, this qualitative desk study has been carried out purposefully to examine the factors hindering the implementation of services for CSEN at all levels of their education and/but more specifically, beyond their primary schooling. In the paper, the use of content and thematic analysis has enabled the author to understand the identified views emerging from the study which have then been classified and arranged according to themes. The themes, based on the findings are further analysed through the lens of Amartya Sen's Human Development and Capability Approach.

The findings of the study indicate that education implementation dilemmas in Zambia are multi-dimensional. Hence, the argument presented here is that building the capacities of children by providing a range of educational opportunities and choices opens doors to many other necessaries of life such as employment. Using the Human Development and Capability Approach as a tool for analysis, the paper evaluates the functioning of the education system, the well-being of *children* and how they fit into the social arrangements of society. Put simply, the process of social inclusion is introduced and highlighted as a significant process in the overall development of CSEN.

**Descriptors: Exceptional Children, Special Education, Inclusive Education, Social Inclusion, Zambia**

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## Dedication

I dedicate this thesis to my late father, Kabwe Godfrey Peter Kasoma who for so many reasons I am still reading today. I am greatly enthused by his writings and his words of encouragement: **"learning never ends".** Doing this programme is a testament to his words. Additionally, a special and exceptionally intelligent child (now young man!) in my life inspired me to write on Children with Special Educational Needs - Ngosa Kasoma, you are truly exceptional, keep learning and you will be ever more enlightened.

## Abbreviations

| | |
|---|---|
| BESSIP | Basic Education Sub-Sector Investment Programme |
| CSEN | Children with Special Educational Needs |
| CSO | Central Statistical Office |
| ECCDE | Early Childhood Care and Education |
| EFA | Education for All |
| GRZ | Government of the Republic of Zambia |
| MDG | Millennium Development Goals |
| MESVTEE | Ministry of Education, Science, Vocational Training and Early Education |
| MoE | Ministry of Education |
| NGO | Non-Governmental Organisation |
| NORAD | Norwegian Agency for Development Cooperation |
| NPE | National Policy on Education |
| OVC | Orphans and Vulnerable Children |
| PRSP | Poverty Reduction Strategy Programme |
| UN CRC | United Nations Convention on the Rights of the Child |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |
| UNZA | University of Zambia |
| UPE | Universal Primary Education |
| ZAMISE | Zambia Institute of Special Education |

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## 1. Introduction

Referring to children as the future leaders of tomorrow has become so rhetorical that sometimes, casual importance is attached to developing and preparing this next generation for their future. As the world races to meet the overall plans of the 2015 global development agenda, the education objectives that countries such as Zambia approved in 2000 with the aim of attaining Education for All (EFA) by 2015 are sadly, a far cry from being realized. In their EFA Global Monitoring Report of 2014, the United Nations Educational, Scientific and Cultural Organization (UNESCO) states that "fifty-seven million of the world's children are still failing to learn, simply because they are not in school" (UNESCO, 2014:1). The EFA goal for this year, 2014 is to improve teaching and learning in order to achieve quality education for all. Hence, achieving quality learning is important for the children identified in this paper owing to their distinctive needs on one hand, and to their overall development on the other.

The significant role education[1] plays in promoting development is noted by many development economists who now also rank high, the concept of social inclusion.[2] Addressing issues of inequalities, poor health, inequities and promoting well-being (Todaro and Smith, 2011; Unterhalter and Walker, 2007) are some of the reasons that make education central to development. Hence, to situate education in development work, one only needs to consider its intrinsic value in promoting people's welfare. Its place in peace and development studies is understandable, given the above.

Educating children is a developmental issue; Children with special educational needs (CSEN) are unique in the intellectual sense, thus, their developmental needs are perceived differently in various research areas such as medicine, physiology, sociology and psychology. In the Zambian context, a child is anyone below the age of 18 (MSYCD, 2006). From an educational standpoint and in order to create a better understanding of this study, an exceptional child also known as CSEN is one who differs from the average or ordinary in mental capabilities, sensory and expressive and physical abilities (Hallahan, Kauffman and Pullen, 2012), to the extent that he or she would need special facilities or a modified school, college or university in order to develop to full capacity (Kalabula, 2007).

In other words, educationalists argue that children can be considered exceptional, given the context of mainstream schooling if their dissimilarity from others is seen as a hindrance to their

[1] Education is defined under the relevance section 1.3.
[2] Social inclusion has been defined in chapter 2.

education progress. Moreover, their circumstances would demand special education services in a special unit or to run concurrently with regular sessions (UNESCO, 1996; Kalabula, 2007; MoE, 2009).

For the Ministry of Education (MoE) however, educating children possessing unique or exceptional needs is guided by such norms and values as the integration of children into normal classroom based programs. Specialists mutually agree that 8 to 10 percent of the children in Zambia are still in this category (Kalabula, 2007; MoE, 2011; Serpell and Jere-Folotiya, 2011) and hence require active intervention and specialized services. Besides, such provision is recognized today as a basic social privilege. Education is beneficial not only to CSEN, but also to the nation as it promotes domestic production and national unity (Central Statistical Office (CSO, 2010).

Statistically, the current national enrollment for CSEN recorded by the Zambia Ministry of Education, Science, Vocational Training and Early Education (MESVTEE) at primary school level stands at 107, 271 and 878 for secondary school (MESVTEE, 2013). The MESVTEE notes the decline in primary school enrollment over the last eight years ranging from 161, 044 (2006) and 202, 115 (2009) to 107, 271 as at 2013. Conversely, in 2006, there were 6, 537 CSEN enrolled in secondary schools compared to 878 today.

The MESVTEE is responsible for administering the education policy in Zambia. Based on their principle of equal opportunities for education, this implies that all persons in general, despite their situation or ability have the right of entry into and participation in the education system and in particular, all pupils and CSEN have the right to receive equal opportunities in full with regard to access and involvement at every level of their education (UNESCO, 1996; MoE, 2011). The MESVTEE acknowledges that education is central to advancing the socio-economic development of a country as it alleviates hunger and poverty. Accordingly, the Ministry has formulated nine broad goals, the first two mainly targeting an increase in access, productivity, equity as well as quality education at pre-primary, primary and secondary levels (MESVTEE, 2011).

### 1.1. Research Problem

Zambia, a lower mid income country is known to rely highly on international monetary and technical aid for its education service provision. From 2000 until 2005 for example, development assistance amounted to 43 and 53percent of the total national funding. However, it is noteworthy, that "not all aid is captured in the budget" (Wohlgemuth and Sassa, 2008:4). Moreover, despite international aid received in the education sector, past reviews of the Ministry of Education's sector plans portray Zambia as a "low investor" in education.

In 2007 for instance, a review done by the Norwegian Agency for Development Cooperation (NORAD) revealed that many projects undertaken by the MoE over time did not perform to the best of government and peoples' expectations. The effect this trend has had on the overall public service has not been positive (NORAD, 2007). Also the statistics on CSEN currently in schools do not represent all other children with learning challenges or other disabilities, due to a poor or lack of a child database (UNESCO, 2014).

Moreover, the overall stagnant learner performance levels of 40 percent recorded between 2003 and 2008 is a clear indication that not much teaching and learning took place in schools during that period, (MoE, 2009). The MESVTEE (2011) attributes poor performance in the education system to many challenges, notably low level commitment to service provision and unmatched (education) reforms to sufficient planning, financial, material and human resources. Non prudent utilization of funds from core educational programmes to administrative activities affects the quality of education for CSEN and conditions of service for teachers.

Additionally, a review of key education policy documents by some Non-Governmental Organizations such as NORAD show that none of the several identified goals to achieve education for all make mention of specific education interventions for CSEN (NORAD, 2007). In a nut shell, there appears to be a problem in translating the Zambian education policy into action. The inadequacy of education service provision for CSEN and the implementation dilemmas of special education at Primary and Secondary School levels are the concern of this research as will be elaborated later in the findings chapter (4) of this paper.

Zambia is (almost) half a century years old (post-independence), yet, education practice and monitoring is still skewed towards the so called able-bodied children. For instance, inspection of education standards is still focused on normal or ordinary school children who constitute a 90 percent of the child population. This category "who are believed to be able-bodied" (Kalabula, 2007:2) have had in this regard, an advantage over their intellectually challenged counterparts in that ordinary education planning in the last few decades has been more informed by the presence of the majority of such children. Incidental to the foregoing, this research seeks to assess the education services available for CSEN in Zambia at Primary School and Secondary School level, with emphasis on the later, particularly due to the gap in programme prioritisation of secondary education.

## 1.2. Research Relevance

Aware that CSEN are unique individuals in their own right, and that their needs are child specific, the research seeks to draw insight from the principle of "the best interest of the child" as outlined in the United Nations Convention on the Rights of the Child (UN CRC) to support the explanations of the issues emerging from the study (UN CRC: 1989:3)[3]. Zambia is party to the UN CRC, which makes her accountable not only to national obligations but also to international commitments such as the UN CRC.

Attainment of education for children, regardless of their learning ability is very essential for their development. It goes without saying that *education for all* opens avenues for people to use their potential to fulfill their rights as human beings. The UNESCO (2014) clearly points out in its EFA Global Monitoring Report the case of continued deprivation of education opportunities over the last ten years "for people in the most marginalized groups" [4](UNESCO, 2014:1). Efforts to put up facilities and provide education services generally for CSEN are not at par with those of ordinary children. The lack of education provision for CSEN is evident even at planning stage to the extent that actual planning for special education learning needs has continuously and conspicuously been omitted. The Sixth National Development Plan (SNDP, 2011-2015; Revised-SNDP, 2013-2016) informs the debate. Three arguments therefore make this study a powerful case for situating education at the centre of the global development agenda after 2015 as well as at country level: *poverty, human rights and inclusiveness in society.*

First, the issue of *poverty* in Zambia cannot be ignored. Structural imbalances in the system, social norms and economic shocks are at the origin of poverty and vulnerability; CSEN are vulnerable to these conditions and would face even more risk if living in poverty. In Zambia, poverty is defined as a lack of income, learning and work opportunities, privileges to national goods and services such as housing and other basic necessities (CSO, 2007:2) and in numerical terms, it means living below US$2 a day as in absolute poverty (Todaro and Smith, 2011:2). According to the Central Statistical Office (CSO) 2010 report, poverty in Zambia stands at an alarming rate of 60.5 percent (CSO, 2010:2). Consequently, protection

[3] The best interest of the child shall is a primary consideration in all child matters (Article 3:1, UN CRC)
[4] To marginalize is to exclude people from participating in societal activities and from accessing social services due to disability or belonging to some grouping.

measures are required to address the different levels and forms of poverty that CSEN are susceptible to. Poverty can become an intergenerational cycle if not addressed. Education, as explained in this paper is one such measure that would enable them to mitigate the starkness of poverty.

Education as a *human right* offers the second argument to undertaking this study. Education is an acquisition of knowledge and skill (Todaro and Smith, 2011). By virtue of being human, everyone is entitled to (formal) education because it is an essential capital that enables one to access various necessaries of life such as decent work and housing. Additionally, equitable education rights give cognizance to CSEN as individuals with unique needs, hence requiring individualized and most suitable school placements. The concept of rights therefore, underscores the importance of advocating for the policy and legislative adjustment to include the needs of CSEN.

Whilst primary education has been locally and globally acknowledged, secondary education has not been recognized as a key goal internationally (e.g. in the UNESCO EFA, 2014) and neither is it a priority goal at Zambia's national level. Hence, this becomes important to address in the research, considering that higher education is crucial to increasing opportunities for earning a decent living in Zambia as well as for building social networks. CSEN need exposure to such networks if they are to be independent and compete in the job market. This brings us to the third argument, the *social inclusion* aspect.

*Social inclusion* is recognised as an important process in the advancement of education as it provides opportunities for achieving social justice and participation in life's activities. Zambia acknowledges the importance of social inclusion for people such as CSEN. As such, the Persons with Disabilities Act of 2012 clearly demands for educational and societal inclusiveness, provision of as depicted in the Persons with Disabilities Act of 2012 which demands for educational and societal inclusiveness for people such as CSEN. The need for alternative learning, "respect for difference", social acceptance, "full and effective participation and inclusion in society" for persons with disabilities which include CSEN are well elaborated in the Act. Considering that the origins of "discrimination against persons with disabilities" are "cultural, social and economic disadvantages" (GRZ, 2011:pp.84-86), not addressing these disadvantages would be an exclusion of CSEN from education achievement in particular and from societal participation in general.

With one year towards the 2015 EFA finish line (UNESCO, 2014) and the recognition that education is a potential driver of economic development at individual and national levels (CSO, 2010:1), carrying out this study is justifiable, most significantly because Zambia clocks '50' years of political independence this year 2014, so enhancing education opportunities for CSEN is timely. Equally, examining education services for CSEN in Zambia is due in part to the reason that overtime, general education has been more emphasized for regular children than for the intellectually challenged, spanning from the independence era to date (Kalabula, 2007). The danger would be that CSEN would be pushed to the margins if not given due attention. In other words, they would be excluded from acquiring education.

### 1.3. Purpose and research questions

The purpose of this case study is to assess the factors hindering the implementation of education services for CSEN at all levels of their learning in general and more specifically, beyond their primary schooling. Further, the study aims to generate information which may be used for the improvement of education practice. The study seeks to understand the perspectives of inclusive education a concept which according to Armstrong *et al.*, (2000) "has had a particularly important role in the critique of segregated special schooling" (Armstrong *et al.*, 2000:22). Inclusive education therefore, an "emerging global trend" today as defined broadly by Kaplan et al:

> *"refers not only to the process of ensuring that all children and adults – regardless of their gender, age, ability, ethnicity, impairment, HIV status, and so on – have access to education within their community, but that the education they receive is appropriate and enables them to participate and achieve, both within their education system and more widely."* (Kaplan, Lewis and Mumba, 2007:23)

It is against this background that the study seeks to address the following questions:

1. **What are the implementation dilemmas of the education system in Zambia regarding special education for CSEN?**
2. **How do these challenges in implementation affect CSEN at different levels of their education in particular and their development in general?**

To answer these questions, the study has considered looking at stakeholders that contribute to the education practice such as teachers, the government as well as the socio-economic factors that have an influence in the whole process of education. In doing so, the study draws on the Social Inclusion Theory put forward by Davys and Tickle (2008) particularly for its ability to include all people into a range of societal activities regardless of their status or abilities, for instance, the disabled. Educating CSEN is extremely important and therefore, it is essential to show how much Zambia has fulfilled its obligations to provide special education services to these children. Social Inclusion serves as the overall perspective for the study.

The research has been conducted in the form of a qualitative desk study and has demonstrated that implementation dilemmas of special education can be linked to the societal inclusion

process. The Human Development and Capability Approach advanced by Amartya Sen[5] which emphasizes the need for a society to fairly provide its people with "basic capabilities" (Sen, 1999; also Deneulin and Shahani, 2009; Unterhalter and Walker, 2007) which they would use to perform the necessary life activities will be applied as an analytical instrument due to its responsiveness to the needs of people that *are living with disabilities*.

### 1.4. Disposition

This thesis comprises six chapters preceded by an Abstract, Acknowledgements, Dedication and Table of Contents. The Introduction gives a brief background to the study and international view on the education debate, whilst introducing two key concepts – *exceptional child* and *special education*. The research problem is stated and the challenges are identified in order to rationalize the study. Then, the purpose of the study is specified as the guiding factor of the study. The debate then ensues in the following manner:

Chapter 2 presents the theoretical framework and herein reviews literary works on the research topic. The main theory, Social Inclusion and the model for analysis, the Human Development and Capability Approach are introduced and explained. Also, introduced in this section are Special Education and Inclusive Education. Chapter 3, the Methodology presents the research design used in the study, beginning with the philosophical view that influences the study then defines the key concepts used in the methodology. The Findings in chapter 4 describe the results of the study, according to their themes. Chapter 5 critically evaluates the findings through the lens of the Human Development and Capability Approach whilst relating to the Social Inclusion theory. Finally, the Conclusion in chapter 6 presents arguments that affirm that implementing special education and inclusive schooling is a challenge in Zambia, alluding to the reasons mentioned in the study. The merits of Social Inclusion with regard to children in the Zambian society are restated in this chapter.

### 1.5. Limitations

As this was a desk study, the data collated comprised mainly secondary sources and in some instances, primary data from the Zambia Central Statistical Office reports. Lack of resources to travel and conduct fieldwork in Zambia was one of the limitations. The initial aim was to collect

[5] Human Development and Capability Approach is fully defined in chapter 2 section 2.2 and 2.3.

primary data from key personnel as well as interview some of the children experiencing learning challenges. The views of such children therefore, especially with respect to their participation in the education system could not be directly obtained. The conclusion was thus drawn from the literature reviewed in the study and not as result of direct views from the subject of study.

Another restriction in conducting the study was the limited current data on Zambia especially in relation to demographic aspects of CSEN and disability. Some government documents such as education related policies were difficult to obtain. However the documents and reports made by the Ministry of Education, other key Ministries and independent persons were available. Efforts were made to use the most current data, but where *old* data was used, it helped in making comparisons between the levels of achievement and non-achievement. Thus, it should be noted that using current data does not alter education practice and service provision; it does not for instance change the nature of learning disability or disposition towards CSEN.

### 1.6. Delimitations

The boundaries set for this study were firstly, the choice of analytical framework. Education is a developmental issue and thus, it would have been expected to make an assessment of education services from the lens of an economic development model. However, the economic model has not been used for analysis because for children with special education needs (CSEN), it is believed that the problems they face are not only fiscal, but have to do with an array of other important factors such as social, cultural and values or moral explanations of the research area. The economic model might have confined the discussion and outcome of the study to economic factors. Hence the choice to use a normative analytical framework, the Human Development and Capability Approach as the issues of CSEN are better examined through the lens of this approach, due to its affinity for advancing individual abilities of those that lack them, more so than economic based approaches.

Additionally, the study did not focus on children aged 3 to 6, even though some among them may be experiencing intellectual challenges for the reasons that early childhood education has had considerable support from government and other relevant stakeholders (MoE, 2004; 2009). Hence, children under focus in the study ranged from age 7 to 18 principally because this is the standard age for primary and secondary schooling in Zambia. Also for the findings chapter,

literature on other regions is not used except to amplify a point; this is because the study is specific to Zambia and hence the use of sources and studies done on Zambia.

### 1.7. Reliability, validity and biases

Being a national of the country in which the study has been undertaken, overcoming biases has been given considerable thought by making the methodology transparent. The question of objectivity in conducting the study has been acknowledged and thus, the author's disposition has not been biased in the manner of reporting. Data specific to the focus of study has been collected and reported as is. The findings and analysis therefore, have been as objective as possible, describing combined aspects of difficulties faced by CSEN rather than an individualistic one. Such a consideration is consistent with Creswell's research methods (Creswell, 2007).

In addition, the results obtained have been presented objectively for the purpose of fulfilling the advocacy call for positive change towards CSEN. The views of the author and the intent of the relevant education authorities (as described in their policy documents) towards educating CSEN are of a shared vision; that is, to achieve optimal solutions for CSEN. Similarly, the views of independent experts on the field in the reviewed literature are acknowledged as being cardinal to the Special Education debate.

By being objective, the study can be said to have addressed issues of validity. According to Mikkelsen (2005), validity means giving a precise picture of the findings that reflects reality. Regarding reliability, it is acknowledged that the results of this study may not be generalised. However, it is the view of the author that the Human Development and Capability Approach taken in this study can still be applied to other services for children not within the scope of this study but facing learning or similar challenges. Reliability has also been augmented by using triangulation of sources, that is, by cross referencing empirical data on similar debates.

# 2. Theoretical and Analytical Framework

## 2.1. The Theory of Social Inclusion

Social inclusion and inclusive education have often been used interchangeably by most scholars and educational practitioners (Hornby, 2011). The significant difference is that while inclusive education is specific to the education community, social inclusion is a broader participatory process in the wider society or community, i.e., it goes beyond the education sector.

Most scholars such as Chenoweth/ Stehlik (2004) and Clark et al., (1999) assert that the theory of Social Inclusion is a process, yet research indicates that to some, it is an end to other courses of action. Chenoweth and Stehlik (2004) see inclusion not as a consequence of some action but as a value based process in which relations and participation are vital. They state that inclusion is a process brings on board different kinds of people in the society (*Ibid.*). The process of how to achieve societal inclusiveness, Charema (2010) writes, should essentially begin prior to the child's first engagement in school; central to this is the promotion of parental support and appreciation of children whilst helping them to thrive. Conversely, Hornby (2011) states that social inclusion is a goal aimed at creating an inclusive society that respects individuals and recognizes their different attributes. What is essential to inclusion is to embrace attitudes that are rights-based. The United Nations International Children's Fund states that enhancing prospects and hopes for disabled children makes them less susceptible to victimization and segregation (UNICEF, 2013:11).

According to Davys and Tickle, (2008), the theory of Social Inclusion is grounded in the fundamental principle that if the process of inclusion does not take place in a given society, *the chances* are that people will be marginalized, isolated and lose confidence in the social system. The two suggest that a society that enables people to acquire skills and abilities which they like (or even choose not to appreciate) is deemed to be inclusive. Davys and Tickle (2008) thus define the theory of Social Inclusion as a process which enables every person in the community to participate in normal activities of the society in which they live, including education, employment, public services and social recreational activities. They maintain that "Inclusion involves being able to access and use mainstream services and being included fully in the life of the local community" (Davys and Tickle, 2008:359).

Additionally, examining the education services for CSEN in the context of inclusive practice makes the study a case for social justice, meaning that people ought to be treated with impartiality.

Avramidis, Bayliss and Burden (2000) state that "The concept of inclusion thereby becomes part of a broad human rights agenda that argues that all forms of segregation are morally wrong" (Avramidis, Bayliss and Burden, 2000:192). This justifies the use of the Human Development and Capability Approach as it has the potential to contribute to the improvement of people's welfare and unifies the discussion on education, well- being and societal participation (Todaro and Smith, 2011:365 Deneulin and Shanan). The approach is elaborated further in the section below.

### 2.2. The Capability Approach

Amartya Sen's Capability Approach is a normative framework through which social engagements, individual well-being, achievements and participation in societal activities are assessed (Sen, 1999; Alexander, 2008). To Sen, well-being, entitlements and achievements denote valued activities like education, nutrition and health (basics) and others such as self-respect, safety, employment and social recognition (*Ibid*.). The above essentials are referred to as functionings and opportunities which Sen puts simply as "capabilities" (Sen, 1999, 2004; Deneulin and Shahani, 2009:31). Central to the Capabilities Approach then is that "social arrangements should aim to expand people's capabilities – their freedom to promote or achieve what they value doing and being" (*ibid*).

The Capability Approach is multi-disciplinary and it can be applied to many fields such as special education. According to Sen (1999; 2002), education has an important part to play in a person's life as it increases one's appreciation of a productive human life that one gains from extensive learning (also in Todaro and Smith, 2011). Alexander (2008) notes that the value of Sen's approach lies in its sensitivity to the less advantaged such as the disabled whose "physical traits, talents and circumstances", being different from others, make them more prone to social discrimination (Alexander, 2008:40). Although Sen is an economist, his approach is termed as a model on which (development) economics and the broad spectrum of "social sciences" is based (Deneulin and Shahani, 2009:30). Sen's Capability Approach upholds the freedom and ability to utilize the specified possessions one acquires and to participate in community activities among other values.

## 2.3. The Human Development Approach

The United Nations Development Programme defines human development as "both the process of widening people's choices and the level of their achieved well-being" (cited in Robeyns, 2005:pp.25-27. The Human Development Approach emphasizes values in a public system and encourages a selection of which values to pursue to avoid conflict. Hence, this paper views the Human Development Approach as a framework through which people's choices, well-being and values in a system are evaluated. Robeyns (2005) shows explicitly that the Human Development Approach is multifaceted and consequently "relates to many aspects that concern people's lives, not only economic ones" (Robeyns, 2005:28). These include but are not limited to education, education policy, health and culture.

According to Sen, (1999) and Deneulin and Shahani, (2009:32) the Capability Approach should not be seen as a "theory" but a methodological instrument of application in the evaluation of "phenomena". Robeyns explains it this way:

> *"the capability approach is not a theory that can explain poverty, inequality or well-being; instead, it rather provides a tool and a framework within which to conceptualize and evaluate these phenomena. Applying the capability approach to issues of policy and social change will therefore often require the addition of explanatory theories".* (Robeyns, 2005:94)

It is for the above reason that the study is guided by the Social Inclusion Theory, as it emphasises the importance of participation for all in societal activities which are largely influenced by social policy to effect social change. Further, working with the Human Development Approach promotes the value of CSEN as human beings. Hence, considers that spending on CSEN's education is a way of building human capacities such as "skills, abilities, ideals, health" which when increased can contribute to developing the economy (Todaro and Smith, 2011:365-778). Tikly and Barrett (2011) maintain that spending on education plus "education quality" leads to developing the economy (Tikly and Barrett, 2011:4; Burnell, Rakner and Randall, 2011:342).

## 2.4. The Special Education Concept

The divergent views on Special Education can be traced across various research where some confine it to instruction intended for the individual disabled child's fulfilment of necessities while others note its ability to provide more widely, as Farrell (2012) suggests that Special Education "refers to distinctive provision, including education, for pupils with disabilities and disorders" (Farrell, 2012:19) fostering educational and personal growth.

Similarly, the Zambian policy on education describes Special Education as a learning curriculum that is partly similar to the program offered to students in the same age bracket, to be specific; it refers to distinctive and supplementary aspects of ordinary schooling (MoE, 1996; UNESCO, 1996:67). Farrell (2012) concurs with the notion of distinctiveness that Special Education proposes, i.e. the unique needs of children. In some international circles, Special Education has been criticized for placing too much emphasis on special needs fulfillment as the ideal way to teach children, confining them to a technology aided environment instead of incorporating the children in the main education community (Veck, 2013). What is important to note, Farrell (2010) argues, is that educators and other key professionals ought to adopt best practices favoring the child's learning.

Martin Buber (cited in Veck, 2013) argues that the epitome of education is to perceive that children are influenced by exposure to the wider society. Veck (2013) suggests that a society (and education system) that is inclusive is one that brings close the learner from the detached learning environment offering specialist education to one that encompasses the child's well-being. He maintains that such a society would improve our vision for education but more widely, the UNESCO (1989) also stipulates that educators globally should adhere to the United Nations Convention on the Rights of the Child (UN CRC) universal principal of making not just educational but all social, legal and administrative activities serve what will benefit the child best (UNESCO, 1989). This therefore brings us to briefly refer to three important perspectives of inclusive education namely, Full Inclusion, Moderate Inclusion and Responsible Inclusion as they relate to the study.

## 2.5. Three Perspectives of Inclusive Education

A worldwide declaration supporting Inclusive Education that was made by the UNESCO (1994) in the Salamanca Statement[6] was reaffirmed in a more recent research that proposed that "children and youth with special educational needs be included in the educational arrangements made for the majority of children" (UNESCO, 1994:6; Serpell and Jere-Folotiya, 2011:214). The UNESCO and Serpell/Jere-Folotiya both acknowledge, however, the difficulties faced by inclusive schools in achieving education for all children especially those severely disadvantaged and disabled.

Nabuzoka and Rønning (1997) concede that inclusive education is a process through which an effort is made by a school to broaden its scope by way of reorganizing its syllabus to accommodate diversity of pupil needs. By this, a school would facilitate attendance by all and so rule out pupil exclusion. Hornby (2012) maintains that inclusion is a process in which there is a complete systems change of learning institutions so as to facilitate the transition into inclusive schools.

However, pupils do face challenges in adapting to inclusive schooling. According to Clark et al., (1999), pupil problems in learning are caused by "the inappropriate responses that are made to those students by their schools" (Clark et al., 1999:158). Nabuzoka and Rønning (1997) suggest that inclusive schooling decreases the shame experienced in isolated schooling and also enables able-bodied pupils to be more receptive to their disabled colleagues. The study thus views the discussion of the three different but interrelated perspectives of inclusive education as important.

### 2.5.1. Full Inclusion

Full Inclusion as espoused by Farrell (2012) is defined as follows:

> *"Full inclusion implies that all children are educated together in the same main classrooms, following the same curriculum at the same point in time, and experiencing essentially the same teaching as other children."* (Farrell, 2012:10)

[6] The Salamanca Statement and Framework for action on special needs education was made in Spain, 1994 to support access to quality special and inclusive education (UNESCO, 1994)

Further in Hornby (2011), the perspective of full inclusion which advocates for children's learning in mainstream classrooms and not in special units or schools of any kind "has been highly criticized" and if followed, it is said to be harmful to the education of CSEN as well as the whole special education community (Hornby, 2011:323). Hornby illustrates that full inclusion is characterized by the "basic human right" principle that advocates for "all children to be educated along with their mainstream peers" (Hornby, 2011:324; 2012:54). Though the human rights aspect is important, Hornby like others acknowledges the limitations of full inclusion as a concept. Diversity of needs calls for other models of inclusive education. A variety-based model different from full inclusion known as "moderate inclusion", as favored by Cigman is discussed in the next section.

### 2.5.2. Moderate Inclusion

Cigman (in Hornby, 2011) does not espouse the perception of full inclusion but opts for an alternative and argues that moderate inclusion provides a range of alternatives from which pupils can learn; starting with "special schools", designated special educational needs sections in ordinary schools, and when favorable, CSEN and ordinary children share the same school room. The latter is the actual situation in the majority of nations today (Hornby, 2011). This implies that CSEN are not short of choice and moderate inclusion would thus provide this alternative.

Cigman (2007) argues that children who do not succeed in ordinary schooling constitute a small number but must be given due recognition. She further states that such children should receive extra teaching provision beyond the capacity of collective schooling. The insistence on commonality in the needs of children has in the past pushed for change to a more sensitive (child centred) model according to Dyson (2001). Cigman (2007) reasons that "failure to address the needs of a very small minority means failure to accord respect to all" which hence falsifies the inclusion concept (Cigman, 2007:792). A child centred approach is thus favored by some practitioners and scholars alike. This is explained as Responsible Inclusion in the section below.

### 2.5.3. Responsible Inclusion

Schumm and Vaughn (1995) define Responsible Inclusion as "the development of a school-based education model that is student centred and that bases educational placement and service provision on each student's needs" (Schumm and Vaughn 1995:265). Responsible Inclusion aims to provide mainstream teaching except in circumstances when the education system proves short of fulfilling the pupils' needs. Schumm and Vaughn (1995) maintain that such an approach emphasizes placing the pupils' requirements above that of the principle views of the school and learning curriculum. Ordinary full time learning does not benefit all pupils; in such placements, some do not excel in education or social interactions.

Although Schumm/Vaughn (1995) and Cigman (2007) agree on the variety of services for CSEN, Cigman is more for placements choice while Schumm and Vaughn add to this continuum, the focus on the child's needs as priority. This model thus proposes a "continuum of services…" to meet the unique needs of students in their school, advocates for monitoring and evaluation of teacher performance, capacity development, and is open to the inclusive viewpoint "for continued change and refinement of their service delivery model" (Schumm and Vaughn 1995:268).

## 2.6. Literature Review

### 2.6.1. Special Education in Zambia

In High Income Countries and Low Income Countries, Special Education is a concept that has been under debate over the years, especially with regard to what it really entails. Only a few disciplines have defined special education for what it really is, which makes the concept even more misunderstood. However, special education in the Zambian context means education that is tailor-modified to fulfil the requirements of underprivileged children living with mental or physical disabilities. This definition as noted by Kalabula (2007) falls short of a profound comprehension of the special education concept. Although academic papers and journals have been written on special education as well as disability in Zambia (see Serpell and Jere-Folotiya, 2008; Mung'omba, 2008), few books if any have been written on special education wholly by a Zambian. Kalabula (2007) was one of the first to have ever written a book on the subject.

A point worth noting is that every child is special and unique and that children's entitlement to education is a human rights issue. According to Kalabula (2007), Special Education is an ancient practice which one would relate to disability. Following the works of various scholars (such as Reger, 1968; Kirk, 1972; Williams, 1988) who all link special education to disability or in some cases, to "gifted children", Kalabula (2007:7) states that special education in Zambia has undergone many changes; from being administered as a programme in different government departments, to finally being domiciled in the Zambia Institute for Special Education (ZAMISE) under the Ministry of Education (MoE). These changes, despite some positive developments in special education have shown just how challenging service provision to CSEN has been.

In Sub-Saharan Africa inclusive of Zambia, the identification of special needs in children is first noticed by parents whereas children with special educational needs are detected by the school teacher and are known to "learn things differently" (Gous and Mfazwe, 1998:8). Gous and Mfazwe (1998) who suggest that there exists a relationship between learners with special education needs and Intelligence Quotient (IQ) highlight the uniqueness in human beings in this regard. According to the two, IQ is a means to test the level of intelligence one has. For children with a low IQ, learning progress is slower than that of their peers. Consequently, integrating them in mainstream education comes with challenge. However, such a process as inclusive education tends to benefit CSEN who feel a sense of belonging in mainstream classrooms. Moreover, inclusive teachers tend to rewind their lessons to accommodate CSEN and in the process, the whole class gains as they are "given more opportunities to master skills" (*ibid.*) due to repetitive teaching.

Special needs children have over the years acquired different labels in Zambia as in other countries. In Zambia, the development of labelling overtime as affirmed by Katebe, (2013) has had little influence in educational policy and practice due to the use of borrowed terminologies from the western world, suggesting a lack of originality in the education system. Katebe (2013) asserts that the depth in IQ of learners does not define the term intellectual disability; hence, the two do not relate. However, he states that classification is crucial to determining the type of special education a learner would need, spelling out the advantages and drawbacks of education practice if learner assessment and classification is not adequately and appropriately handled.

Congruent with the Zambian MoE's strategic focus, training of special needs teachers is based on a five module teaching plan (MoE, 2003). The Ministry identifies eight categories of learners: those with visual and hearing impairments, intellectual and physical disabilities, behavioural and neurological disorders; developmental delays and giftedness. This makes teaching and learning strategies "impairment, disorder and disability specific" (MoE, 2003:15). Accordingly, it is required of Special Needs educators to be more strategic in their teaching as this enhances the learning process in the classroom.

### 2.6.2. Inclusive Education

In Zambia, inclusive education is viewed by some as a supplementary service to special education ran alongside normal schooling (Simui, cited in Miles, 2009). The MESVTEE (2011) regards inclusive education as a process of integrating into ordinary schools children whose learning disabilities range between (and including) mild and moderate. Further, inclusive education is viewed as an equity issue but measured only in relation to gender ratios.

Whereas the Government of the Republic of Zambia showed recognition for educating CSEN in the mid 2000's, Kalabula (2007) noted the lack of political will to release adequate funding for appropriate functioning of special education. He further asserts that the problem lay mainly in the supposition that investing (much money) in CSEN yields little or no fiscal returns and suggested that government leaders and educators in particular were the most wanting. A case in point is where visually impaired learners who, after completion of secondary or primary schooling cannot access gainful employment but instead join the line of those begging on the streets (Kalabula, 2001).

Nevertheless, as difficult as integration may be for slow learners, such a process in Zambia is ideal to purposefully advance the education and social inclusion agenda in which CSEN would be prepared for further assimilation into society as adults. The suggestion put forward by Kalabula (2007) is that where feasible, educational inclusiveness in the mainstream should be the norm for CSEN. As with Hallahan, Kauffman and Pullen, (2012) and Serpell and Jere-Folotiya, (2008) he also maintains that CSEN are exceptional but goes on to say the difference such exceptionality offers interferes with normal pedagogy. On mainstreaming disability in normal schooling for CSEN, Kalabula (2007) touches on the subject that such children have for

some time now been side-lined by the Ministry of Education. While education services for normal school going children have been monitored for effectiveness through inspections for forty years, this has not been the case for CSEN. Although school inspectors have usually focused on examining the standards of education "through children who are believed to be able-bodied", Kalabula emphatically states that:

> *"No standards officer in the Ministry of Education, has ever taken interest in the standards of education of the disabled or the popularly known as children with special educational needs."*
> (Kalabula, 2007:2)

Moreover, he stresses that inclusive education for people with disabilities who have special educational needs is "part of a large human rights movement which calls for the full inclusion of all people with disabilities in all aspects of life" (*ibid*:3). By definition, human rights are the privileges and freedoms people are entitled to by virtue of being human (UN CRC, 1989; UNDHR, 1948). All children, CSEN inclusive have a right to enjoy such liberties as education. Human rights are significant in this regard for they possess an affinity for fulfilling the needs and aspirations of persons of with disabilities and in addressing diversity.

Just as being able-bodied is part of human life, so is living with a disability. Gous and Mfazwe (1998:45) state that "Disability is something we accept as being part of our humanity". They go on to suggest that if all people worked in unison to support children with disabilities, such networks could build stronger communities.

# 3. Methodology and Methods

## 3.1. Metaphysical Position

This study is engaged with CSEN as persons at risk of exclusion on the one hand and of marginalization on the other, that is, exclusion and marginalization in the sense of segregated schooling and discrimination. The plight of CSEN in relation to the education received is therefore very important to examine. Given the above, the study underscores the challenges in the current education provision, providing what Creswell (2007) refers to as advocacy for the subject of study. Such a study is traditionally influenced by the transformative world view.

Mertens (2010) defines the transformative paradigm as a framework which provides the basis for a researcher to direct one's work towards advocating for societal equity and fairness. "A transformative worldview holds that research inquiry needs to be intertwined with politics and a political change agenda to confront social oppression at whatever level it occurs" (Creswell, 2009:21; 2014:9-10; Mertens, 2010). It is anticipated that the results obtained from this study may be used by the political leadership and the education community in Zambia to enact assenting action for the advancement of education for CSEN, one which is directed at achieving quality education, learning and social inclusion. Other stakeholders wishing to advocate for change in the lives of CSEN are also recognised as change agents.

The transformative world view is also known as the Advocacy/Participatory view, and is more applicable to addressing the needs of the marginalized whilst promoting acts of assistance to such people. The paradigm lends legitimacy to principles and methods of research that prioritize fairness and "human rights" (Mertens, 2010:473; Denzin and Lincoln, 2013:484) and it allows researchers to bring about social change and equity to those in need, mostly the disadvantaged (Creswell,2014) such as CSEN. It is ethical to promote societal fairness and privileges in a transformative study. Denzin and Lincoln (2013) refer to this as an "axiological assumption" by which the transformative paradigm is best described. Equally important in such studies is to make epistemological assumptions that there is much more to know about the issues surrounding the subject of study, such as appreciating individual variety and also multiplicity of scholarly views, hence the need to carry out a study that can be relied upon and applicable to the society concerned (*Ibid*). In a nutshell, the research is aligned with the Advocacy / Participatory paradigm or transformative worldview due to its ability to transform the lives of CSEN.

### 3.2. Type of Study

A qualitative single case study has been conducted with the purpose of examining the education services for CSEN in Zambia to show the challenges in education service provision and the difficulty in accessing this service by the identified children. Basically, the investigation is based on a desk research. Bennett and George (2005) define a case as a distinct part or characteristic of a historic occurrence that is chosen for examination by the researcher while Brantlinger et al., (2005) state that a case is an "exploration of a bounded system" such as a "group", "event", "phenomenon" or "process" (Brantlinger et al., 2005:197). Congruent with the definition of Brantlinger et al., (2005), this case study is an examination of a distinct "process(s)", in that case, inclusive education, special education and social inclusion as they impact on the "group", herein called CSEN.

The merit of using a case study as a research method lies in its ability to test a hypothesis and its special usage in developing theory. The in-depth study conducted in case research allows for fine-tuning of theories and concepts. In this way, a researcher can attain "high levels of conceptual validity" (Bennett and George, 2005:19). Although case studies are not easy to generalize, one can use the supposition derived from them to explain other circumstances (*Ibid*). Moreover, this method of study has been chosen for its unique ability to give clarity to complicated situations and because it is a type of qualitative research which allows for a better understanding of CSEN made possible through descriptive and interpretative information.
Consequently, this research has combined descriptive and interpretative methods to allow the author relate the meaning of certain variables to others, and how these variables explain different occurrences within a given situation (Mikkelsen, 2005). For example, in the study, the Human Development and Capability Approach have been applied to give meaning to a particular phenomenon within a given context. Interpreting, describing findings and analysing results are important stages of research (Brantlinger et al., 2005:200), thus, this study has also allowed for a description and understanding of "narratives" and "quotes" to be found in the data. Further, the qualitative study will allow the researcher to use a hermeneutic approach to "go back and forth" around the variables and patterns so as to interpret phenomena between the "part and the whole" using data techniques as will be described below (Braun and Clarke, 2006:pp. 77-90).

### 3.3. Data Collection

Based on a qualitative approach, the data was collected mainly from secondary sources using scientific articles, journals and books from the local library (Linnaeus), the Nordic Institute of African Studies (Uppsala) and also public documents from international organizations, such as World Bank, UNESCO, the Zambian government and some Non-Governmental Organisations (NGO). The advantage of using this type of data collection, as noted by Creswell (2009) is that it is already recorded and presented as evidence. Meyer *et al.,* (2000) equally state that "Data do not always need to be collected: use can often be made of materials that are already available" (Meyer *et al.,* 2000:6).

### 3.4. Data Analysis

#### 3.4.1. Textual and Content Analysis

Titscher et al., (2000) define a text as a forthright document that should fulfil a particular seven (7) text standard. This paper is concerned with the to and fro connection and recurrence of concepts within the text, use of abbreviations, and show of interdependency between variables as well as descriptive or argumentative relation to other texts in the study. Simply put, a text should be characterized by cohesion and coherence, according to Titscher et al., (2000) who suggest that "every text must satisfy these two criteria" (Titscher et al., 2000:24).

Textual analysis is a method for studying texts that allows a researcher to gather data and use it to interpret how other researchers in the field have understood the topic at hand. According to Mckee (2003), a textual analysis is an approach used by researchers to make sense of how members of different cultures "fit into the world in which they live" (Mckee, 2003:1). Titscher et al., (2000) state that texts can also be found in newspapers, books, letters, articles among others and from these, empirical data would be collated for (textual) analysis. That given, data derived from published materials or government reports has been examined in order to understand how CSEN are socially accepted or fit into the education community and the wider society.

Content analysis on the other hand is a "close inspection of text(s) to understand themes or perspectives" which according to Brantlinger et al., (2005:197) form part of the scrutiny chapter in qualitative studies. Data is collated, categorised or coded in readiness for analysis

and final conclusion of results (Titscher et al., 2000). In this case, the findings chapter has been organized into sections based on similarity, that is, coding and analysing has been possible due to the natural sequence of the scientific texts under analysis.

### 3.4.2. Thematic Analysis

Thematic analysis is a technique used in research to identify and organise data into distinct parts. Contrary to some scholars who claim that themes are hidden in the data, waiting to be searched or looked for, Braun and Clarke (2006) argue that it is the task of the researcher to use their creativity to bring to life patterns that they find interesting and valuable enough to communicate to the reader (*Ibid.*). Much of the literature reviewed coincided or intersected with each other on various issues, thus the thematic analysis was useful in interpreting and clustering similar issues together.

Boyatzis (1998) describes thematic analysis not as a specific method but as an instrument used from one approach to another. Thematic analysis is said to have the ability to potentially provide a multifaceted thick and detailed description of data as it is flexible and can be applied to various theories (*Ibid.*). This method has enabled the author to work with the Social Inclusion Theory and the Human Development and Capability analytical approach, the latter of which has operationalised the analysis by applying the prescribed seven terms of reference to the findings (see 3.4.3 below). This is in order to facilitate the response to the research questions set out at the beginning of the study. Therefore, analysing the findings of the study using text, content and thematic analyses has been made possible through the application of the Human Development and Capability Approach postulated by Amartya Sen (Sen, 1999; 2004).

### 3.4.3. Applicability of the Human Development and Capability Approach

Inherent in the Capability Approach is the notion of "functioning, capability and agency" where functioning means engaging in activities one views important while an appreciation of several of these activities that enhance "well-being" constitutes capability. Agency is being able to advance desired goals (Sen, 1999; 2002; Deneulin and Shahani, 2009). The approach therefore, being multi-faceted is concerned with many aspects of human life, such as the plight of the disadvantaged thereby questioning the issues of societal values and equality. Similarly, the Human Development Approach aims to broaden opportunities for humans beyond

acquisition of income so as to facilitate the enjoyment of long, healthy and resourceful lives (Sen, 1999; Deneulin and Shahani, 2009). Application of the Human Development Approach is based on four key mutually supporting principles often used to chart the human development process; equity, efficiency, participation and sustainability.

As a multi-dimensional normative (i.e. evaluative) framework, the Human Development and Capability Approach has been applied so as to evaluate the choices and opportunities available to CSEN in particular and the values in the education and societal system in general based on the functionings, capability and agency as well as equity, efficiency, participation and sustainability. The approach is primarily concerned with "outcomes and processes" (Sen, 1999; Deneulin and Shahani, 2009:22) within the system. Consequently, aspects of human capital, "social arrangements", individual well-being, achievements and participation in societal activities have been assessed based on these criteria (Sen, 1999, 2002; Deneulin/ Shahani, 2009; Robeyns, 2005).

The approach has been applied to assess how much Zambia has fulfilled its obligations to CSEN's accessibility and attainment of education, to what extent education has been inclusive and has also looked at the long term benefits of education or consequences of illiteracy and how the society as a system in general impacts on CSEN. Particularly, the education system has been gauged by asking whether the implementation measures have in essence satisfied the seven principles mentioned above. The Human Development and Capability Approach is hence deemed suitable to assess such aspects as it has the ability to gain insight into the way that society incapacitates or weakens people with deficiencies.

# 4. Findings

## 4.1. Brief background

In 2004, out of the world's 93 million children under the age of 14 who were living with a moderate or severe disability, 0.7percent of these were in the severe category (such as epilepsy) and most do not complete primary schooling (UNESCO, 2014). Also common in low and mid income states is the probability that 30percent of disabled people do not complete primary education unlike those without a disability. In Zambia, the primary completion ratio of persons with disabilities and those without is reported to be 43percent and 57percent (*Ibid*.).

The special education arrangement in Zambia that characterised the period after independence, that is, exclusive schooling for people with disabilities was a creation of the charitable assistance received prior to independence. The "31 special schools and 80 special units" established in the country were not sufficient for the bulk of children with disabilities (Moberg, 2003:419). Today, there has been a shift towards educational inclusiveness and an expressed need to devolve special education to the lower levels as echoed in the following statement:

> *"Traditionally special education concentrates on educating deaf, blind, mentally retarded and physically disabled children for which specialization areas teachers have been trained in a centrally located institute during the last two decades."* (Moberg, 2003:419).

Inclusive education has been one of the key goals for the Ministry of Education in Zambia. Much effort has been made to include children in education at primary school level, but in many instances, this has been met with challenges. In its EFA Global Monitoring Report of 2013-2014, the UNESCO (2014) indicates that Zambia will not be able to attain the Universal Primary Education (UPE) completion goal for at least "two generations" for the poorest of its children. Currently, the expected completion point is between 2055 and 2065 for girls and boys. However, for the universal junior secondary accomplishment, the report states that this will happen in approximately twenty-one years' time for affluent children while the indications for poor children are 61 to 86 years from now. For UPE targets, it appears the goal has already been reached for the Zambian rich children as at the time of reporting. However, regarding the attainment of the net enrolment target for junior schooling, Zambia lacked data for inclusion in the report (UNESCO, 2014).

## 4.2. Factors affecting education provision

### 4.2.1. Access to and participation in education services

Monitoring education services in Zambia are done through inspections in order to know how programmes are being implemented. In this regard, the Central Statistical Office (CSO) collects data on various sectors for use by relevant stakeholders. For instance, the population censuses conducted by CSO provide general indicators of the population participating in education programmes (CSO, 2012).

Notable among the challenges in the education service provision are those related to access. In a study done by Peters (2003) on factors influencing access to schooling, data revealed that socio-economic aspects and the approach to common customs on disability were found to significantly affect school admittance. This is usually influenced by multi-level factors which according to Peters (2003) include pupil, school, household, community and national. The study showed that discovering and encouraging children to enroll in school is a difficult task. However, a "Child-to-Child" program carried out by parents and the community of Mpika, Zambia is reported to have been fruitful in identifying thirty CSEN who had not been in school and consequently, these children were admitted to Kabale primary school in Mpika, Zambia (Peters, 2003:31).

The Ministry of Education 2004 policy regarding access and participation was meant to remove barriers to accessing education. The interventions carried out during 2004 led to the construction of more classrooms as a result of the policy, for example, 3,396 classrooms were constructed in that year. Measures such as these facilitated enrolment of orphans in schools from 350, 292 in 2003 to 507, 000 and 452, 000 in 2004 representing a 44.9percent increase (MoE, 2004).

Distance is another contributing factor to non-participation in education as some schools (and health centres) are far from children's homes. In a study conducted by Moberg (2003), he stated that one-third of school-age children do not participate in school due to "illnesses and long distances" (Moberg, 2003:419). In the same study, the unwillingness of teachers to incorporate physically or visually impaired children on account of distance is reflected as common in Zambia. Hence, distance is said to hinder participation in school programmes for these children. Special schooling, preferably boarding is thus considered to be more appealing.

In addition, class presence of rural based teachers is affected by distance especially when they have to commute to distant towns to get their monthly salaries. Moreover, 50percent of the salary goes towards lodging and transportation (Akyeampong and Bennell, 2007; UNESCO, 2014). Akyeampong and Bennell (2007) illustrate this point further when they note that the concentration of teachers is greatly affected due to a shortage of time. As the teacher is not attending school while picking up the salary, this has a negative effect on their schoolwork as well (*ibid.*). Additionally, a study made by Das et al., (2007) shows that a 4 percent drop in both English and mathematics knowledge achievements by Zambian 5th graders was attributed to a 5 percent rise in non-attendance of teachers. This clearly indicates of how detrimental teacher truancy is to pupils' education.

In 2010, the Sightsavers NGO reported that less than 10 percent of Zambian children who are blind or have low vision receive any kind of formal schooling. The lack of schooling therefore, tends to fuel a cycle of illiteracy and poverty, leaving people who are blind as one of the most vulnerable and excluded groups in Zambia as in other parts of the world (Akakandelwa and Munsanje, 2012:43). Additionally, Serpell and Jere-Folotiya (2011) in their study on *Basic Education for Children with Special Needs* state that overall, children with disabilities in Zambia are classified as an especially underprivileged group when it comes to accessing basic schooling. Their study identified a (donor funded) programme, the Basic Education Sub-Sector Investment Programme (BESSIP) implemented under the umbrella of the Poverty Reduction Strategy Programme (PRSP)as one aimed at enhancing enrolment and improving learning quality, specifically for grades 1 to 7.

Serpell and Jere-Folotiya (2011) stated that the Basic Education Sub-Sector Investment Programme (BESSIP), although its goals included an action agenda for the more deprived, the programme did not state clearly how the needs of children with disabilities would be especially met despite receiving colossal funding. The primacy of making education adequately special to meet the needs of exceptional children was not accorded enough attention by many who championed the cause of BESSIP.

Participation in education programmes requires identification of children prior to enrolment. In 2010, the CSO reported that the enrolment rate for children in the MoE increased due to a rise

in the number of basic schools (Grade 1-9) and upper secondary schools in the same year. However, the data on enrolment achievements is mostly gender based and its completion rates vary between 26.8percent to 5.7percent for primary and secondary schooling, (see section 4.2.2).

### 4.2.2. The rationale for prioritizing high schooling

As this paper intended to show inter alia the problem existing for children in gaining post-primary education, the magnitude of this concern is presented here.

From the year 2000 and beyond, the progress in secondary education enrolment in Zambia has been declining largely due to an increased poverty rate, growing direct schooling costs and employment scarcity (Bennell, Bulwani and Musikanga, 2008). It is not uncommon for the majority of students at secondary schools to be from well to do backgrounds and those from poor families attend high schools with difficulties such as the ones aforesaid. A situational analysis focusing on the support of high-schooling in Zambia and its costs thereof suggests that secondary school going children are from rich families whose parents have most likely been to college or have a tertiary qualification.

Similarly, the Ministry of Education (2011) in its Sector Implementation Framework report also emphasized that the high funding allocated to Primary Education over long periods of time has led to low education quality at Upper Basic and Secondary levels. As a result, the Secondary Sub-Sector has not received as much funding as the Primary Sub-Sector. The Ministry further stated that an overall problem in monitoring and evaluating Special Education programmes at all levels also makes it difficult to prudently use available resources.

The study conducted by Bennell, Bulwani and Musikanga (2008) showed that the curriculum being used at the time was reported to have disadvantaged the Special Education sector in terms of participation. The study revealed that the Ministry of Education as the custodian of curriculum development planned its syllabi as per subject guide and not as per "learning areas and outcomes" such as special education. The designing of all subjects, both compulsory and electives, at (primary), upper basic and secondary schooling did not benefit the Special Education sector as a result in the period of 2008.

In 2003, the Ministry of Education undertook a thorough review of the high school education level to enhance cooperation among "high schools, skills training centres under Technical Education and Vocational Training and higher education institutions" with the aim of improving school admittance and fairness in the sub-sector. Increasing access was deemed necessary in this sector due to its prior neglect in past decades, compounded by the particular attention paid to the primary sector under the BESSIP between 1999 and 2002.

Also, the Ministry of Education (2009) reported that education advancement for children with disabilities recorded a low admission of 5.1percent in basic education but the corresponding figures for secondary level (grade 10-12) was a mere 1.58 percent, an indication of a low progress rate and "a very high dropout rate" (Akakandelwa and Munsanje, 2012:43). It is further reported that the special learners completion rates for secondary schooling in 2010 was a low 5.7 percent compared to 26.8 percent for primary schooling (CSO, 2010). In another report, data showed that young persons that only hold a primary education qualification or none at all only manage to get casual jobs in later life (UNICEF, 2010).

#### 4.2.3. Policy context

In Zambia, the implementation of education programmes in general and the provision of intellectual and other disability matters in particular is governed by various pieces of legislation and policy, which provide for the legal protection of children with disabilities, promotion of their human rights, equal access to education and other community services among others. Notable among them are the Education Act (1966), National Policy on Education (NPE-1996), the Persons with Disabilities Act No. 6 of 2012 and the Pupils with Special Educational Needs Policy. The corresponding international legal instruments include the UN CRC (1989), the Framework for Action on Special Needs Education Salamanca Statement of 1994, UN Convention on Persons with Disabilities (2006) and the Universal Declaration of Human Rights, Declaration on Social Progress and Development. For the sake of this study, however, the main unit of analysis is the education system which administers the National Policy on Education.

Following the Salamanca Statement of 1994, the Ministry of Education established a policy "Educating our Future" which stresses the need for parity in education service provision (UNESCO, 1996). According to Muwana (2012), this policy created a platform for making

education inclusive in Zambia and recommended that children with disabilities be included in mainstream teaching. Consequently, the Ministry had formulated nine broad goals, the first two mainly targeting an increase in "access, efficiency and equity to quality" education at pre-primary, primary and secondary levels (MoE, 2011:33).

In principal, the existing NPE of 1996 provides for implementation of "free primary education for all" in response to state obligations and in conformity with the Millennium Development Goal (MDG) to attain universal primary education up to completion by 2015 (CSO, 2012:24). The aim is to harmonise free primary education for all with access, efficiency, equity and quality as stipulated in the policy goals.

There is policy recognition for every individual's right to education and that education is a human capital that can be used to enhance the well-being and quality of life for people as a whole. The concern to promote these privileges through comprehensive development as well as provide an environment in which the intrinsic value of education in society is fulfilled remains the role of the Zambian Government (MoE, 1996). The Policy's strength has been in its efforts to combine both the analysed national situation challenges in the last decade and the global EFA goals and the MDGs (NORAD, 2007).

NORAD, (2007) in its evaluation of the education system illustrates that education has always been high on the Zambian Government agenda. The study however revealed that the major policy pronouncements which Zambia made over the years had neither been adequately financed nor put into action. Even more problematic is the absence of state policy to explicitly cater for the intellectually disabled. For instance, social welfare assistances in Zambia as noted by Mung'omba (2008) do not cater for intellectually disabled people and neither is there explicit measures backing families who are incapable of caring for children.

#### 4.2.4. Quality of education

The UNESCO (2014) in its EFA Global Monitoring Report suggests that elementary aspects of education such as learning how to read can indicate a country's education quality. Its data on Zambia shows that over 75percent of the children that have attained the age of primary education have been reported to go beyond the fourth grade. However, among these, only 44percent are able to read while 35percent cannot read. Also, the remaining 21percent did not make it to the fourth grade.

Zambia's education plans are partly responsive to the needs of CSEN but they are largely centred on enhancing admission of pupils generally, expecting that this would result in knowledge acquisition. The UNESCO (2014) EFA Global Monitoring Report states that if education is of low quality, it hinders learning and the most affected are disadvantaged children. The report suggests that education quality may be compromised for reasons such as classroom overcrowding. In Zambia, there are more than 40 pupils in every class indicating teacher recruitment gaps of about 95 percent to enrich the quality of education. A supplementary education budget up to 35 percent is required to remunerate new teachers. The challenge of overcrowding mentioned above is faced by some special schools in Zambia, for instance the University Teaching Hospital (UTH), Kabulonga and Munali High Special Schools in Lusaka.

Muwana's (2012) attitudinal study reports that the teacher education program at the University of Zambia (UNZA) aims to train knowledgeable, skilled and assertive graduates who would satisfy the needs of all pupils. A study done by Lewin (2008) also shows that in place of University graduates, diploma holders in Zambia teach science and mathematics in poorly equipped laboratories which dents the quality of the sciences. Further, the MoE (2009) reports that trainee graduates whose academic concentration is primary and secondary education are not mandated to focus on special education. This has been found to be a possible irregularity factor in attaining inclusive education practice alongside teachers' attitudes and inadequate facilitative provisions for CSEN.

The MoE (2009) also accords high importance to literacy and numerical proficiency for lower and mid primary school, in both English and local language as well as skills training in problem resolving; this serves to equip students with social skills for societal life and for an acceptable basis for those who are still learning. Plans and interventions aimed at promoting the above are encouraged.

### 4.2.5. Availability of learning and teaching materials and other enabling conditions

Research on availability of learning and teaching materials revealed that many "libraries and resource centres" in Zambia are ill-equipped and operate on restricted budgets, making ordinary service provision difficult.[7] Fulfilling the need to extend "information service provision" to the physically disabled has been expressed as even more challenging (Akakandelwa and Munsanje, 2012:43). In its curriculum, the MoE has subjects in local languages which are taught in schools not only to preserve the culture but offer an alternative to enhance pupil learning.

Closely after the PRSP, and Program for the Advancement of Girls Education, a programme strongly favouring children who lost their parents to HIV and AIDS was commenced, bringing with it the term orphans and vulnerable children (OVC). Concern for the need to affirmatively act in favour of the OVC's spurred some inequalities in the awarding of education subsidies e.g. the bursary scheme, by "allowing children and youth from well-to-do families to invoke orphan-hood as a basis for financial aid sometimes at the expense of more needy individuals" (Serpell and Jere-Folotiya, 2011).

Muwana (2012), in an attitudinal study shows concern for the gap existing in Zambian schools in the area of sign language and Braille. Similarly, Lewin (2008) also notes the inadequacy in functional laboratories as contributing to weakening the teaching of sciences. Despite that the MoE oversees the provision of learning materials, it is anticipated that this function will be devolved to the District Education Boards. However, the uneven distribution of schools adds to the dilemma of implementation of the much needed education service. Below is data on the school allocation as at 2007.

Serpell and Jere-Folotiya (2011) report that in 2007, the larger share, i.e. 53percent of the primary schools for CSEN were concentrated in the more built-up provinces of Zambia where Lusaka accounted for 376,740, Copperbelt 534, 726, Central 367,520 and Southern 422,828 schools. Whereas the less developed provinces at the time, Eastern, Northern, Luapula, North-Western and Western Provinces account for only 1,464,497 as compared to 3,166,310 of the urban-based provinces. In other words, the provincial allotment of CSEN basic education

[7] This research was done on visually impaired persons but could hold true for other disabled children.

services and centres was uneven. Serpell and Jere-Folotiya (2011) state that Lusaka and

Copperbelt provinces combined share about 1,500 primary and basic schools, accounting for 18 percent of the national total. What is evident in the data is the uneven distribution of CSEN school facilities countrywide and in addition, special education units constituting classes with few students. Accountability issues over infrastructure provision and a highly centralized system (NORAD, 2007: 9) among others have been noted as an obstruction to implementation of special education and a hindrance to the process of inclusion for CSEN.

### 4.2.6. Stakeholder disposition towards Inclusive and Special Education

#### I. Parental disposition

In most of Zambia, intellectually disabled children are often looked upon with fright and it is reported that the children's "difference" probably embarrasses the family such that the children are kept out of site (Mung'omba, 2008:144). Given this unfavourable family disposition, many parents do not divulge information on their exceptional children and as a result, their children's problems remain unknown and untreated (UNESCO, 1996:66).

Still, more research shows disability to be characterized by embarrassment, blame, despair, and a sense of wanting to protect the child (Peters, 2003:30). Similarly, UNICEF (2013) affirms that "Exclusion is often the consequence of invisibility" and further reports that information on child disability statistics on children is inconsistent (see also under participation 4.2.1). Also the data on the effects disability has on children is undependable. The report states that "A society cannot be equitable unless all children are included, and children with disabilities cannot be included unless sound data collection and analysis render them visible" (UNICEF, 2013:63).

The Moberg (2003) study revealed challenges faced in incorporating CSEN into mainstream schooling. Teachers were found to have difficulty in assimilating CSEN into general schooling, particularly the physically challenged children. With this perception in mind, the teachers steadfastly opted to isolate the severely disabled more so than the moderately disabled children (Moberg, 2003). In the Mung'omba (2008) study focusing on social justice, the findings indicate that intellectually disabled people take care of themselves "even when circumstances are not favorable for them".

### II. Teachers' disposition

Research on education services in Zambia indicates how difficult the response to inclusive education has been. In 2001, a study conducted in North-Western and Western Provinces of Zambia revealed that about 63 percent of teachers were in favour of inclusion that promotes fairness but expressed opinions for "segregated" schooling particularly for children with "severe mental disabilities, behaviour problems and hearing impairment" (Moberg, 2003:426). In another study, teachers' refusal to incorporate the visually impaired children into their classrooms was reported to worsen the situation while teachers' and ordinary children's social acceptance of their disabled peers showed positive effects on the attitudes of all concerned Mung'omba (2008).

Muwana's (2012) attitudinal study on UNZA Special and Secondary Education students portrays the readiness in most teachers to include the physically disabled more than those with intellectual challenges. The study indicates unwillingness on the part of these prospective teachers to make adjustment to the curriculum to suit varied pupil aptitudes. Muwana (2012) postulates that making the UNZA curriculum more flexible to address varied pupil needs would yield to successful educational inclusiveness. Such an approach supports "active planning", acknowledging pupil diversity because "not all students are alike, and therefore, do not all learn the same" (Muwana, 2012:100). This study confirms a disposition of reluctance among secondary school education students and education practice towards inclusive education for CSEN in Zambia.

A disability study encompassing Lusaka and Chikankata district schools in the Southern Province of Zambia illustrated that teacher disposition to a child with special educational needs such as one with epilepsy tends to have negative long-term effects on the child. Even when at employable age, job seeking people with epilepsy are relegated to casualization which Birbeck et al., (2006) underline as limiting their socio-economic opportunities.

### III. The Ministry of Education and its affiliates

The MoE (2011) note importantly that of the external (and national) funding received for the execution of education programs, the highest chunk of this fund is spent on management and administration activities. As this is the biggest challenge, it has an effect on quality education provision for CSEN in a number of areas such as limited resources being spent on "infrastructure and desks", "teaching and learning materials" as well as low educator inspiration occasioning high truancy of teachers among others. There is also a low level of skilled teachers, limited human resource with appropriately specialized skills; inadequate screening and assessment tools and systems to address the challenges facing CSEN. Further, developing better policy strategies on Special Needs and Inclusive Education is also problematic (MoE, 2011). In other words, the consequence is a negative service provision at the expense of key Ministerial goals.

Additionally, the umbrella organisation on special needs education ZAMISE (supervised by the UNZA) is responsible for training special needs teachers in the country but though many have been trained to handle CSEN at primary school level, they are not skilled enough to take on the challenge of teaching CSEN at post primary levels (Serpell and Jere-Folotiya, 2011).

### 4.2.7. Financial challenges and Inclusive Education

Factors affecting the implementation of education services for CSEN and indeed all other children in Zambia are mainly twofold (and sometimes more): educational and economic. As some studies suggest, "a strong national education system may be a necessary but not automatically sufficient prerequisite for the implementation of effective policies towards students with disabilities" (Anastasiou and Keller, 2011:354). So a robust education system coupled with other enabling conditions should be in position to translate policy into action.

This means that other factors such as the economy may affect service provision. Echoing a UNESCO (2011) report, Anastasiou and Keller (2011) indicate that in Zambia, like in other sub-saharan countries the inclusion of disabled children in any form of specialized schooling has been affected by the financial factor. Teaching expenses for these children are higher than for the less disadvantaged children due to the "expense involved in mitigating the disadvantages they face" (UNESCO, 2014: 124). In other words, the materials and equipment involved plus the time spent on such children costs more.

In another report, (Moberg, 2003) social issues such as poverty were highlighted as posing a challenge to attaining inclusive education in Zambia. For instance, in the early 2000's, about one-third of children old enough to attend school faced exclusion from school on fiscal grounds (Moberg, 2003; Ngandu and Moberg, 2001). In a later study on the status of Intellectual Disabilities in Zambia, Mung'omba, (2008) emphasized this point when he said that it would be futile to engage in a social inclusion debate if the poverty issue were not dealt with first.

The UNESCO (2014) EFA Global Monitoring Report stresses the importance of directing spending on education towards those often side-lined such as children with disabilities for whom budgetary allocations are not particularly prioritized. The report further indicates the need for Zambia to hire more primary school teachers to improve the quality of learning by 2020. Additionally, the entire Sub Saharan Africa needs about US$4 billion (on top of country Gross Domestic Product) for salary remuneration of teachers at primary school level. The report states that even with the increase in primary education spending, Zambia being a low investor on education would not beat the 3 percent target on primary schooling; only a 1.1 percent increase would be made in this regard.

## 4.3. Government efforts in education

### 4.3.1. Programme prioritisation

The results of this study indicate that children's education has mostly been concentrated at primary school level. An example is the BESSIP (see also item 4.2.1.) which was implemented under the PRSP in the 1990's aided by the World Bank. The PRSP was aimed at reducing poverty in the country by strengthening human capacities, for instance through education. The provision of quality education for every child was emphasized by the BESSIP, however, the World Bank's claim that the National Policy on Education was the steering force behind BESSIP contrasted with what was actually implemented, specifically, the diversion from clearly and originally planned action to include CSEN in mainstream education. Rather, more prominence was given to the rural poor in the name of poverty reduction and to advancing education for the girl child through the PRSP.

Consequently, the overly prioritised BESSIP and its strong emphasis on responding to donor demands limited the chances to expand policy alternatives and guidelines on other equally important sectors such as special education during the period of implementation. Hence, matters

specifically dealing with CSEN's education were not particularly prioritized (Serpell/Jere-Folotiya, 2011).

### 4.3.2. The need for a CSEN data base

The collection of data on children with disabilities by most countries such as Zambia has many flaws. However, such data is essential for policy planning and for addressing children's constraints (UNESCO, 2014). From 2009 to 2010, the number of CSEN in Zambia rose from 168,866 to 220,000 at Basic Education level while the corresponding figures for High School were 3,732 in 2009 to over 6,000 in 2010. But not all other children with learning challenges are covered in this data. It is noteworthy that out of the overall school populace, CSEN only comprised 1.1 percent in 2002, i.e., 23, 000 with an increase of 50,000 in 2004 totalling 73,000 CSEN (Serpell and Jere-Folotiya, 2011). Seven years ago, this number increased to 170,084 as recorded in the 2007 Educational Statistical Bulletin of the MoE (MoE, 2007).

Despite the momentum, Serpell and Jere-Folotiya (2011) make two important clarifications; the inclusion of CSEN in general schools, though positive, did not specify the type of support needed and secondly, other physically challenged children fewer than CSEN and learning in exclusive schools and units were receiving support from expert teachers and had the necessary teaching materials to mitigate their learning difficulties. Additionally, the MoE (2009) indicates in its report that the type of teacher training the system provides is a possible cause for irregularities in attaining inclusive education particularly due to poor programme prioritization which negatively affects CSEN.

### 4.3.3. Ministerial Achievements

Despite the findings of the study revealing challenges in education service implementation, it is worth noting that the Ministry has scored successes in other areas. The first thing to note is that the Ministry has a new Policy on Education enacted in 2011. Another success scored in education implementation is the Early Childhood Care Education and Development (ECCDE) programme which caters for children from 1 to 8 years. These are children who constitute the pre-school education level (MoE, 2009). This programme is widely supported and has a number of policies supporting its administration. The basic principal influencing ECCDE is that when children are given a good education foundation, they are more likely to excel in later years. The sector also promotes fair provision of education services for CSEN at this level (MoE, 2004).

Additionally, the Ministry has facilitated the construction of schools and facilities for teacher training especially in the peripheral areas, for instance, in Muchinga Province (MoE, 2011, MoE, 2009). Also, it is envisaged that child protection services will continue being promoted under the current Government. To this effect, the country has revised child related laws to harmonise inadequacies and ease implementation of services. Successes such as these ease participation in education.

## 5. Analysis of Findings

This chapter will critically assess the foregoing findings in relation to the principles of the Human Development and Capability Approach which are functionings, capabilities, social agency, equity, participation and empowerment, efficiency and, sustainability .

As Sen's Human Development and Capability Approach largely focusses on the holistic development of the individual and emphasises participation as a crucial characteristic of the development process (Sen, 1999; 2002) with particular emphasis on the needs of the less advantaged, his paradigm is significant to assessing the education services in Zambia, particularly for CSEN. The Human Development and Capability Approach places education at the centre of its approach, stating that education is a human capital that influences the "development and expansion of other capabilities" as well as "human freedoms" which means the ability to lead a life one so desires (Sen, 1999:74; 2002; Unterhalter and Walker, 2007:8). So the lack of education harms personal development; the ability to choose and to live a full life.

Although Sen's approach is a multi-dimensional analytical model which advocates simultaneous action of outcomes and processes (Sen, 1999; 2002; 2004; Deneulin and Shahani, 2009), it is applicable to assessing the needs of CSEN who firstly, are part of the education community and secondly, part of the society in which they should be included. Recalling the purpose of this research (see chapter 1) and as a follow-up to the findings in the foregoing chapter, the inquiry is supposed to bring answers to these questions;

***What are the implementation dilemmas of the Zambian education system regarding special education for CSEN? How do these challenges in implementation affect CSEN at different levels of their education in particular, and their development, in general?***

The inquiry hence directs attention to how much Zambia has fulfilled its obligations to providing education for CSEN, particularly, by gauging whether the education interventions have in essence satisfied the seven principles of the Human Development and Capability Approach which are; functioning, capability, agency, equity, efficiency, participation and empowerment and finally, sustainability. A brief explanation of each principle is presented prior to its application to the results shown in the preceding chapter.

## 5.1. Functioning, Capability and Agency

### 5.1.1. Functioning

In his Development as Freedom, Sen defines *functionings* as "the various things a person may value doing or being" and may range from the more basic ones, for instance, enjoying good health and balanced meals, to personalised multifaceted activities such as participating in community activities, having an income and self-confidence (Sen, 1999:75), being educated and being with loved ones (Unterhalter and Walker, 2007:4). Generally, most children enjoy schooling and being at school, partly due to time spent in between breaks with loved ones, that is, peers and more so that they can learn to read and write. This of course deals with issues of access to education by all types of children, the able bodied and the intellectually challenged such as CSEN. The Zambia National Policy on Education of 1996 provides for implementation of "free primary education for all", meaning that CSEN are included in this provision. However, the findings presented under (4.2.1) on *access* show that indeed, not all children in Zambia have access to and participate in education activities. For example, whereas small class size in special education units is one aspect of measuring school success, the findings overall indicate that CSEN are not adequately catered for. The above demonstrates education deprivation and poor or none participation in community activities.

Additionally, common customs on disability prevent the child from being identified for enrolment indicating parental or family obstruction while illnesses and long distances signifiy a lack of health centres and local schools or if available, a lack of financial resource to pay for services and non-availability of transportation to get there. This would mean that the guidelines the Ministry set for itself to provide "access and participation" have not been met (see 4.2.1). In a nut shell, the "functioning" criterion has not been met as the child has been unable to access and participate in the education services and partake in the activities of the community school life.

In addition to the above, the 2004 Educational Statistical Bulletin makes no mention of building disability friendly infrastructure to cater for CSEN or other disabled children. Such an omission would imply that CSEN cannot easily gain "access" or "participate" in these schools even if they were inclusive. In view of Sen's Human Development and Capability Approach (Sen, 1999; 2002; Robeyns, 2005), there is an apparent lack of provision for CSEN to access such schools. Put simply, in the absence of "functionings", CSEN are unable to participate in societal processes such as school activities, gaining an education and spending time with

loved ones. It can be argued that to keep these functionings out of the child's life is to keep them from being socially included.

### 5.1.2. Capability

Capability refers to being able and free to enjoy a combination of functionings. Sen (1999; 2009) claims that capabilities are the freedoms that are fundamental to a person's enjoyment of a life he or she finds worthy. Capabilities permit one to achieve the valuable things that foster well-being, i.e., functionings like getting educated. The latter contributes to other opportunities for personal development. This is elucidated in the following statement: "Once children are participating in education, once the "mechanisms" of education are functioning correctly, it is possible to consider the capabilities that can be gained through education (or not gained, or even possibly lost (Sen, 1999; 2004; Unterhalter and Walker, 2007:117). This means a system can be assessed by considering if other possible life gains that come with being educated have been attainable. For the education system, this implies a lack in education supply for CSEN and other children and the possibility of a lost opportunity.

The findings that indicated that CSEN rarely go beyond primary schooling and in some cases, non-attainment of primary education would mean that they lack the freedom to gain many of life's opportunities that one gains if in school and beyond. The findings confirm that indeed accessing education services is a challenge for an ordinary child and worse still for a CSEN who lives far away from a school or even a health centre. For the teacher, implementing education programmes for these children is hindered by the distance in school location, a factor affecting access. Also, in the absence of child find strategies such as the Child-to-Child program, many children would be unknown to the education community such that they would be excluded from the process of education and would lack participation in community activities which would affect their overall development.

As education opens doors to many other opportunities, it is evident that Zambian children need to be educated and qualified to secure their future. The situation in the country is that gaining employment is difficult for most children who have left or finished school, as jobs are both competitive and scarce. This makes it all the more challenging for children who do not even have the *capability* to enjoy a life they value in the absence of education. This qualifies the statement advanced by Sen (1999) and Unterhalter/Walker (2007) that gaining access to the labour market requires (relevant) qualifications and civic knowledge to participate in public

and political courses of action. These are some very important capabilities that one can get from formal education. The lack of post primary qualification renders CSEN incapable of gaining decent work.

This and other reasons are the basis for engaging in positive discrimination for secondary schooling particularly for CSEN and for all other children in general.

### 5.1.3. Agency

In his Development as Freedom, Sen (1999) defines *agency* as a person's active involvement in determining their future when they have the "opportunity" to do so. In his approach, Sen emphasises the closeness between individual agency (freedom) and social commitment. Freedom is placed at the centre where people need the capability to set their own goals and pursue them. Social commitment in development programs in this case ought to be equitable.

The education community is in many ways responsible for deciding on including CSEN in its activities, but the findings have shown how challenging this is especially if and when an individual's participation in determining their future is hampered by non-availability of opportunities. Opportunities such as varied alternative learning and expert teachers to provide special education according to their diverse needs notably on all levels are part of the social arrangements that society ought to provide. The deprivations faced by CSEN in Zambia, such as barriers to education enrolment and completion, exclusion in the sense of non-acceptance by teachers and over shielding by parents can be said to interfere with the process of inclusion in societal activities-a process which according to the theory of social inclusion advocates participation of individuals in not only the education community but the larger society as well. Sen states that "Individual agency, is ultimately central to addressing these deprivations" and can "deliberately bring about radical change" through improved societal organization and commitment (Sen, 1999; 2002; Unterhalter/Walker, 2007:42; (Deneulin/ Shahani, 2009:28). It is important then for CSEN to not be always isolated as in a segregated school, hence the need for inclusion in mainstream schooling where interaction with ordinary peers is possible.

Inclusive education as a process promotes the teaching of CSEN together with peers to enhance social interactions. Consideration however, ought to be given to the dilemma of (individual) difference. It is important to know if CSEN are "recognized socially and educationally as having equal claims on resources and opportunities" (Unterhalter and Walker, 2007:6) Therefore, being

reasonable in the selection of the level of inclusion is important for CSEN. Aware that most CSEN cannot voice their opinion on their education (or societal) matters, the need for advocacy on their behalf is apparent. Thus, human agency is seen both at the level of CSEN and the education community (teachers, parents and other practitioners).

The role of *agency* should not be ignored as it complements with social arrangements and vice versa. The findings show that a person's involvement in societal activities is influenced by the political, social and economic opportunities obtainable. Hence the deprivations faced by CSEN in this case are due to a lack of social commitment by the education community and the society as a whole. This ultimately affects their development at different levels of their education, from pre-school through primary to secondary school. Lastly, an aspect that is crucial in individual agency is that of human capital. Human capital "concentrates on the agency of human beings in augmenting production possibilities" (Sen, 1999:293).

## 5.2. Equity, Efficiency, Participation and Sustainability

### 5.2.1. Equity

Equity is based on impartiality and pays attention to fair sharing amid groups. The process of human development, justice and fairness is sought for people to lead worthy lives. Since equity draws on notions of fairness, it is closely linked to equality (Sen, 2009; Deneulin and Shahani, 2009). If a system distributes its resources equitably, chances are that the disadvantaged who may be in need of special treatment will have access to equal opportunities. In this case, special measures are required for the differently abled such as CSEN to enable them to have the same level of capabilities for better functioning.

The findings under programme prioritisation (4.3.1 and 4.2.6 III) show a situation of inequity in the sense that a colossal budget was earmarked for ordinary children in primary schools yet there was no clear indication of how the disabled such as CSEN would be included. Whereas "equity and affirmative action for the disadvantaged" was one of the BESSIP goals, the findings show that the "massively funded initiative" ignored the call of CSEN. Serpell and Jere-Folotiya (2011) put this more succinctly when they said:

> *"Yet when it came to indicators of impact, learning outcomes for disabled children (one category of Zambia's children known to be exceptionally disadvantaged in access to basic education) were notably absent."* (Serpell and Jere-Folotiya (2011:228).

Likewise, findings in item (4.2.4) display the predicament the education system finds itself in when it comes to managing the education subsidy scheme. Paradoxically, one of BESSIP's constituent parts, "equity and bursaries" which was meant to facilitate scholarship for "children at risk" worked more for children and youth from rich families who managed to "invoke orphan-hood" to attain a bursary disadvantaging further the more needy children (see Serpell/Jere-Folotiya 2011). The education service in this light falls short of meeting the equity criteria. Moreover, it can be said that overemphasis on the OVC and Programme for the Advancement of Girls Education programmes under BESSIP makes the need for re-focussing of goals for CSEN even more apparent.

What this implies for CSEN then, is that the inequitable share of opportunities denies them the capability to gain an education, precluding them from future gains such as employment and the ability to interact confidently in society. A CSEN deprived of education has a bleak future and the cost of not providing them with this human capital (education) is felt not only by themselves but also by their families and society which has to look after them in the now and at some later point in life through employment or welfare benefits.

This also clearly does not conclude the social inclusion equation. According to the Human Development and Capability Approach, if during childhood, a child lacks essential capabilities such as education, a human capital, their future well-being is also reduced. Consequently, poverty characterises the life of CSEN if denied the capabilities needed to live a life they rightfully desire. And as poverty is a societal issue, "capability deprivation" has as described above, "larger societal implications" (Unterhalter and Walker, 2007:209). One that stands out is possible exclusion from participating in societal activities.

From an equity viewpoint, the process of inclusion, whether at educational or societal level requires taking on a rights-based approach that enhances the vision for disabled children to make them less susceptible to victimization and segregation. The findings in item (4.2.6.II) on teacher's attitudes and actions toward a child with epilepsy who is an exceptional child serve as an indication of lifelong implications for that individual. A lack of education is a denial of human capabilities and capital which such a child would need to realise their full potential. Education has "an empowering and distributive role in facilitating the ability of the disadvantaged, marginalized, and excluded to organise politically" (Unterhalter and Walker, 2007:8). The non-provision of education which is a denial of a basic right for CSEN serves to confirm "lost opportunities" to CSEN.

Lastly, the unequal allotment of schools (see item 4.2.4) adds to the 'lost opportunities' as some CSEN and other children are denied the opportunity to build their human capital within a school system. The effects of lost opportunities would be seen in the future life of CSEN as 'no education' means harming the development their development, preventing them from enjoying a full life and also society in this case loses out on future contributors to national economic development. This also puts CSEN outside the process of social inclusion.

### 5.2.2. Efficiency

The human development perspective speaks of efficiency as the use of available resources in the best way possible. Efficiency is the minimum cost method used to reach goals through the optimum utilisation of "human, material, environmental and institutional resources" to increase capabilities to the possible maximum for people. The Human Development and Capability Approach places efficiency in a "dynamic context" meaning its use must adapt to the situation (Sen, 2009; Deneulin and Shahani, 2009:29).

The findings in (4.2.3) in particular highlight the National Policy Education (NPE) framework. Whereas adequate attention is given to defining the goals of the NPE and Educating our Future policy, with specific aims to increase access, efficiency, equity, quality and parity at pre-primary, primary and secondary levels, the actual contribution made to address the needs of CSEN is undervalued. Further, the policy's recognition of the right to education and of education as human capital that promotes individual well-being and quality of life is good on the one hand, but in reality it does not show adherence to its own rules and regulations. This is evident in the manner implementation digresses from key programmes areas as can be seen below.

The findings in item (4.3.2) regarding a CSEN data base are indicative of non-utilisation of cost effective planning. Whereas the MoE included CSEN in the general schools, the specificity of support needed was not paid particular attention to. Secondly, more human resource and material for mitigation of learning difficulties was spent or assigned to only a few other physically challenged children, a lesser number than CSEN. These two points indicate a breach of the efficiency principal. Additionally, on programme prioritisation (4.3.1), work plan digression and minimisation of policy alternatives and guidelines dealing specifically with CSEN signifies inefficiency in the use of available resources; that is, more resource wastage

goes to altered plans. For CSEN, this means a loss in opportunities and denial of the capabilities required for doing the valuable things in life, such as getting equal opportunities to education.

The implication of inefficient use of education resources on CSEN is that the less their needs are prioritised, the more the digression of action plans meant for their education and development. If *efficiency* is to be situated in the context of the MoE education system, then one has to think of putting to good use the funding allotted to the institution in a manner that increases the capabilities of CSEN. Yet a look at the review of the MoE system in item (4.2.3) shows how difficult this has been with respect to resource allocation. The paradox is that the system seems to be less efficient in an instructive sense and more preoccupied with managing the administrative side of things. This is reflected in resource allocation to administration more than the share that goes into special needs education. The obvious spiral effect of this is that CSEN are more and more on the side-lines of education administration, as their capabilities cannot increase in the wake of such spending, an obvious obstruction to the process of human development and social inclusion. They are participating less in the education activities, which leads the discussion to the next section.

### 5.2.3. Participation

The Human Development and Capability Approach concept of participation and empowerment refers to "processes" in which people, individuals or groups are actively involved to freely make decisions on issues affecting their lives. It is about "the freedom to hold others accountable for their promises" (Sen, 2009; Deneulin and Shahani, 2009:30). The participation principle places people not at the receiving end of policy pronouncements, but involves them throughout the policy making and execution process, as agents capable of realizing their desired goals.

Participation and empowerment are extremely significant in the whole process of human development and inclusion, whether educational or societal. From an education viewpoint, a child that has the opportunity to access schooling from enrolment to completion is one who is empowered with capital; such a child is able to participate in normal activities of the society in which they live including education, employment, public services and social recreational activities. This is the basis of the social inclusion principle (see Chapter 2, 2.1). Further, the philosophy on which this study is based is a transformative one that advocates a socio-political

commitment and a political change agenda to remove multi-level social oppression (see Chapter 3: 3.1). The participation and empowerment principal, therefore becomes a very key component of the Human Development and Capability Approach, it is through this principal that a child is fully transformed, from childhood to adult life and throughout their whole life.

To build the capacity of CSEN within a restructured education system entails a multi-level process of developing the child; children, parents, teachers, the local community, politicians and many more would be part of the process. An example of teacher involvement is displayed in item (4.2.6.) where teachers' unwillingness to incorporate exceptional children in schools bears negative consequences. Such a dilemma puts CSEN on the margins, denies them opportunities for peer interaction which are needed for esteem building and personal growth. However, in exceptional cases of moral reasoning, the suggested more appealing special residential schooling resonates with Schumm/Vaughn's (1995) view of inclusive education, i.e. *responsible inclusion* which bases placement and service provision on each student's needs. As responsible inclusion aims to provide mainstream teaching except in circumstances when the education system proves short of fulfilling the pupils' needs, the argument here is that this option is optimal for CSEN as it would promote their development within and beyond school life and equip them with capabilities for later use in the society in which they eventually gain inclusion. Responsible inclusion as a choice is consistent with the views of Cigman (2007) and Schumm/Vaughn's (1995) who both argue for prioritising the child's needs above that of the school and giving the child more placement options.

The suggestion that inclusive education is a process of transforming the education system can be seen in the provision of alternatives when the system falls short is a step towards empowering CSEN with human capital, that is, education. Hence the concept of responsible inclusion is one way of empowering CSEN with a very important capability. Education undoubtedly opens doors for CSEN, allows for social interactions and protects them against future poverty.

In item (4.1), although the findings show success in UPE interventions, however, one cannot tell how many of these children are disabled or indeed have learning disabilities in Zambia as what is presented is geographical, wealth and gender disaggregated data. The lack of adequate data collection mechanisms renders the children invisible to a point of exclusion. Identification of CSEN notwithstanding the poor disability records is crucial for participation and empowerment of capabilities. Also the disparity (see 4.1) in enrolment and completion rates for

the differently abled children at 43percent and those without at 57percent already shows non participation in societal and developmental activities for CSEN.

The Convention on the Rights of Persons with Disabilities (CRPD) and the Convention on the Rights of the Child (CRC) stipulate a clear protocol on how to achieve societal inclusiveness. Zambia has consented to and endorsed the CRC and CRPD but has not ratified the CRPD Protocol (UNICEF, 2013:75). This means that while Zambia can promote the rights of children in general, it is not legally bound by the directives of the CRPD Protocol which emphasises the protection of the rights of the differently abled, CSEN. Further implications are that an abrogation of domestic law (that draws from the international) goes unchecked by the international system to which Zambia is a part. As UNICEF succinctly states, "Ratification alone will not be enough" (UNICEF, 2013). One would expect that following ratification of the UN CRC, CRPD Protocol among other National government policies, "disabled people's organizations" (UNICEF, 2013:75) and other stakeholders within the education community need to give more prominence to operationalizing commitments made in favour of disabled children. Only then can CSEN be seen to participate in matters affecting their life.

Despite the fact that participation and empowerment are central to building the capacity of CSEN, the principle in practice would only serve its purpose if the issue of sustainability were incorporated. An examination of the sustainability principle is the task of the next section.

#### 5.2.4. Sustainability

In modern parlance, sustainability is mostly used to bring forth the durability of development in the face of environmental limitations but it is a multi-faceted concept (Sen, 2009; Deneulin and Shahani, 2009). Principally, this section will discuss financial, social and cultural sustainability.

In the Human Development and Capability Approach, financial sustainability refers to development financing methods which do not seriously disadvantage future generations or the strength of the economy, like sinking into debt traps. Social sustainability refers to joint assistance cooperation between groups or institutions that further development initiatives over time whilst avoiding "disruptive and destructive elements" while cultural rights and "respect for diversity" are values that can significantly enhance socially sustainable development (Sen, 2009; Deneulin and Shahani, 2009).

The findings displayed in item (4.2.6) on social acceptance and inclusion of children with disabilities into mainstream schooling exhibit compliance to the sustainability principle due to the portrayal of respect for diversity. Paradoxically, the refusal by teachers to incorporate the visually impaired children into their classrooms may imply disrespect for diversity; hence part and/non-compliance to the sustainability principle. This display of findings is supported by the concept of alternative schooling, precisely *Moderate Inclusion* in the first instance and *Responsible Inclusion* in the latter.

Choosing to moderately or responsibly include CSEN echoes the statement that ordinary full time learning does not benefit all pupils because in such placements, some (CSEN) do not excel in education or social interactions. The significance of this result displayed here is that the importance of social interactions is recognised as playing a facilitative role in the process of capability enhancing and of social inclusion, the ultimate state for all.

The findings on the financial challenge, item (4.2.7) display the cost-benefit analysis on less disadvantaged children and CSEN in the early 2000's. That the teaching expenses for CSEN are high cannot be denied, but in Zambia today, the reality is that the cost of not educating CSEN and any other children for that matter is even higher, considering the forgone opportunities such as well-being, a decent job, and sustaining the economy through taxes as job holders do. If education spending is not allotted to the needs of CSEN, then chances are that they will be illiterate, a cost to their families and a national socio-economic burden. This is consistent with Mung'omba's study which revealed that the intellectually disabled are not adequately covered by social insurance (Mung'omba, 2008).

In order to create sustainable societies, social acceptance of the differently abled is extremely important. Hence, respect for diversity is a condition for social sustainability. Chenoweth and Stehlik, (2004) put it this way; "A community cannot be sustainable unless it incorporates all of its citizens."

Lastly, Zambia has established and endorsed various polices and legal instruments, at national and international level such as the Zambia National Campaign to Reach Disabled Children (ZNCRDC), the Salamanca statement and framework for action on special needs education (Serpell and Jere-Folotiya, 2011:213/214), Persons with Disability Act, the UNESCO EFA,

Convention on the Rights of Persons with Disabilities, the UN CRC, among others but although these steps have not eased education implementation for CSEN, they have however served as a guide to practitioners and relevant authorities.

# 6. Conclusion

This study was set out to assess the education services for children with special educational needs (CSEN) in Zambia with a focus on the implementation dilemmas in the education system and its implications on their development. The research was concerned with studying the factors hindering the participation of CSEN in education programmes using the Human Development and Capability Approach as a tool for analysis.

Using the support of the MoE National Policy on Education, the findings were analysed in line with seven (7) relevant interrelated principles of the Human Development and Capability Approach postulated by Amartya Sen divided as follows: Functionings, Capability, Agency, Equity, Efficiency, Participation and Empowerment and Sustainability. This helped in answering the research questions which were as follows:

1. **What are the implementation dilemmas of the education system in Zambia regarding special education for CSEN?**

It can be said that the study examined the education service delivery and pointed out the implementation dilemmas, ranging from factors such as access, enrolment, and completion of education to issues of school placements to meet divergent needs. Obstacles such as distance from schools and financial inadequacies affected the above. Also, the need to concentrate more on the Secondary Sub-Sector was brought forth, particularly due to the high concentration of past efforts in the other sub-sectors like ECCDE and the Primary Sub-Sector. In other words, programme prioritisation disabled the progression of some sub-sectors as can be seen above.

The study responded to the need for education quality and emphasized its significance as a universal goal for this year but particularly due to the need to produce quality graduates. The availability of appropriate learning materials was acknowledged as a facilitative factor in the education of CSEN who understandably require alternative teaching methods for maximum benefit. Stakeholder disposition towards inclusive education, for example, social acceptance was also highlighted as a factor in service delivery. Lastly, the study responded to the issue of the need for a CSEN database as a necessary tool for planning.

**2. How do these challenges in implementation affect Children with Special Educational Needs at different levels of their education in particular and their development in general?**

Recalling that education is intrinsically linked to development, many other opportunities are denied when CSEN are not educated. Responding to the second question illustrated that a lack of education perpetuates poverty, as a result of inequities as well as inequalities in service provision. On the other hand, educated children are more likely to look after themselves, contribute to the economy and help sustain a better environment (Sen, 1999; Todaro and Smith, 2011; UNESCO, 2014). Moreover, it is argued that education is important not only for CSEN but for the society as a whole. Education as human capital boosts the personal growth of CSEN, promotes well-being and allows for efficiency in the use of capabilities and promotes social cohesion. It is through these processes that reaching a state of societal inclusiveness is made possible.

Lastly, the central element in the educational rights discourse that this paper foregrounds is one of equity ; one that asserts that the longer CSEN are excluded from educational and societal activities, the more they (and their families) will suffer in silence. Therefore, this paper suggests that prolonged exclusion and *silent* suffering may rouse and protract a conflict which may embitter the relation between the state and groups, families and organizations of the differently abled if not mitigated. It is further argued that the issue of rights be a base for advancing well-articulated societal goals that underpin the advocacy of the legal and policy framework favoring CSEN. The foregoing, congruent with the transformative worldview that opposes social oppression (see Mertens, 2010; Creswell, 2009) and that the issues of CSEN be foreground in Zambia's political and educational agenda of Zambia is what this paper advocates.

### 6.1. Discussion

The study suggests that the true sense of well-being and participation in the society by CSEN gives them personal growth and promotes development for both the learner and the society. An educated community is a healthy and progressive one that supports future development without "harming" its future generations. Chenoweth and Stehlik, (2004) support the findings in (5.2.4) by showing the importance of accepting diversity and difference.

Regarding the implementation dilemmas of the education services pertaining to CSEN, it is believed that a fair situation obtaining in Zambia was given. Much positive effort has been pointed at in policy formulation and implementation of programmes in other sub-sectors, notably, the ECCDE and the Primary Sub-Sectors. A point worth noting is that the identified policy key objectives (equity, efficiency and participation) in the National Policy on Education are consistent with some of the principles of the Human Development and Capability Approach.

Another striking effort that has been made by the Ministry of Education is that despite the portrayal of Zambia as a low investor in education, the efforts made towards meeting the EFA goals especially in the Primary Sub-Sector is noted as a fulfilment of six of the principals of the Human Development and Capability approach, i.e. the functionings, capabilities, agency, equity, efficiency, participation. To give a clear example, Zambia is one of the countries that have attained the Universal Primary Education goal ahead of the 2015 deadline. However, there are challenges being faced by the Ministry of Education and other education authorities, ranging from social, institutional, economic, cultural, poverty, practitioners disposition towards inclusive education among others. Also, it is acknowledged that the absence of education leads to many lost opportunities. The unmet need in many areas is hence acknowledged.

While it is understood that education systems across the globe differ, due to differences in resource bases, this study maintains that the implementation of inclusive education is a challenging test for its global application (see Moberg, 2003). The author argues that education is a means to employment, a tool to the full development of individuals, and therefore arguably significant for creating inclusive societies.

Apart from promoting the assessment of people's capability sets, it is argued that the circumstance in which "economic production and social interactions" occur and from which people select opportunity sets ought to be scrutinised for assistive factors – this is consistent with the Human Development and Capability Approach (Sen, 1999; Robeyns, 2005).

The seven point criteria specified in the Human Development and Capability Approach show that the approach is applicable to use in assessing issues of the disadvantaged in society among others. The principle of agency for example-as advanced by Sen (1999; 1999; 2009) and noted by Deneulin and Shahani, (2009) is clear though its implementation is more complex. A person's ability to influence collective choices varies greatly in different contexts because decisions are made by groups. It is for this reason that CSEN's needs are better considered through the transformative worldview as it aims to advocate for change where necessary. Similarly, safeguarding rights for CSEN is another avenue for transforming their lives.

As social inclusion advocates for equal possibilities and choices for everyone, this is something most societies should strive to achieve. By including CSEN in all social activities in Zambia, this process will be fulfilled (Davys and Tickle, 2008). Lastly, if the inquiry seems to have not covered the expected issues, considering the parameters set for the study, the fact is that research is an ongoing process, and one study builds up on another in search for alternative explanatory power on research gaps. Hence, the probing in this case study is not exhaustive and calls for further relevant research.

## 6.2. Recommendations

I. The Zambian Government should, as a matter of urgency revisit the contents of the Revised Sixth National Development Plan, so as to include a stand-alone chapter that will address the plight of CSEN

II. The Government should, through the Ministry of Education initiate a rewriting of the curriculum to make it user friendly for CSEN and subsidize the provision of learning aids and equipment for such learners

III. In the same way campaigns to fight other vices in society are conducted, so should the government champion the cause of educating CSEN; therefore, disability related issues ought to be brought to the fore in sensitization advocacy campaigns.

IV. The Government should ensure that child related law is revisited to ensure that it includes matters of CSEN

V. The government should provide appropriate and adequate infrastructure, furniture and equipment for CSEN as well as conditions of service for Special Education Teachers for motivation and retention

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