Stemming the Tide:

Can Namibia pre-empt the potential reversal in Primary Education achievements?

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Child Vulnerability to Poverty in Namibia: 
Potential Deprivation of the Right to Education

Addressing a public policy question:

Are current policy provisions to achieve Millennium Development Goal on Universal Primary Education adequate in the context of HIV and AIDS?

Final Policy Paper
Evidence-based Policy Analysis for Delivering Results for Children
University of Maastricht

Khin-Sandi Lwin
UNICEF, Namibia
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This year, I took part in the UNICEF global course on “Evidence-based Policy Analysis for Delivering Results for Children” with the University of Maastricht’s School of Governance. A final policy paper was part of the requirements. In deciding my topic, I chose an issue that the GRN and UNICEF Country Programme is grappling with: mitigating the multiple impacts of HIV and AIDS on children’s right to education.

For many years now, we have been concerned that HIV and AIDS will reverse the gains made for children in Namibia but the evidence was not available to advocate for action to pre-empt these reversals. Now, for the health sector, the recent findings of the Demographic and Health Survey (2006) are providing that evidence needed to influence policy and decision makers: Infant and Child Mortality rates have significantly increased after solid progress made since Independence to reduce these rates. For the Education Sector, we still do not have that evidence as there is a time lag between data collection, analysis and publication. We are still working on the basis of 2005 academic year data which shows that net primary school enrolment is doing well at almost 94 per cent. Informal discussions with the Ministry of Education colleagues who are reviewing the 2006 data indicate that the reversal in primary education achievements may be emerging.

This has prompted us to publish this academic paper for wider review and discussion to urge quick action to stem this reversal before it worsens. Normally, UNICEF Advocacy papers are not prescriptive. We simply present the analysis and suggest the way forward for broad actions that can be considered. Academic requirements of the Maastricht course were that I had to recommend clear policy options and to present a case for these adjustments based on a cost-benefit analysis. Hence, the paper is more prescriptive than the usual UNICEF publications. The proposed policy adjustments are:

*The abolishment of the School Development Fund combined with revised operational cost provision to schools (planned under ETSIP) and a targeted Education Development Fund, focusing specifically on OVC to cover non-school education expenses.*

In the concluding months of my assignment in Namibia, I hope that this contribution to Namibia’s commendable efforts for children will be taken in the spirit it is offered. After almost 7 years in the country, interacting and working closely with all levels of government, civil society and communities, it is disheartening to see such reversals in the progress made for children. But the deep and sincere commitment to Namibia’s children is unabated in all spheres and that alone can be the driving force to counter the devastating damage of HIV and AIDS. The Millennium Development Goals can still be achieved in Namibia – if we act swiftly and decisively.

Khin-Sandi Lwin
UNICEF Representative
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Acronyms:

AIDS Acquired Immunodeficiency Syndrome
ART Anti-retroviral Therapy
CWG Child Welfare Grant
DHS Demographic & Health Survey
EDF Education Development Fund
EMIS Education Management Information System
ESAR Eastern and Southern Africa Region (of UNICEF)
ETSSIP Education and Training Sector Improvement Programme
GE General Education
GF Global Fund for HIV/AIDS, Tuberculosis and Malaria
GDP Gross Domestic Product
GRN Government of the Republic of Namibia
HDI Human Development Index
HIV Human Immunodeficiency Virus
IMR Infant Mortality Rate
MBESC Ministry of Basic Education, Sport and Culture (consolidated with MHETEC as MOE)
MDG Millennium Development Goals
MG Maintenance Grant
MGECW Ministry of Gender Equality and Child Welfare
MHETEC Ministry of Higher Education, Technology and Employment Creation (consolidated with MBESC as MOE)
MIC Middle Income Country
MMR Maternal Mortality Ratio
MGECW Ministry of Gender Equality and Child Welfare
MOE Ministry of Education
MOHSS Ministry of Health and Social Services
MWACW Ministry of Woman Affairs and Child Welfare (former name of MGECW)
NGO Non-governmental organization
NPC National Planning Commission
ODA Official Development Assistance
OVC Orphans and vulnerable children
PEPFAR Presidential Emergency Programme for AIDS Relief (of the US Government)
PPP Power Point Presentation
RAAAP Rapid Assessment, Analysis and Action Plan (for OVC)
SDF School Development Fund
SSA Sub-Sahara Africa
UNICEF United Nations Children’s Fund
U5MR Under 5 (years old) Mortality Rate
WFP World Food Programme

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EXECUTIVE SUMMARY

Namibia has in effect achieved Millennium Development Goal Two for universal primary education, with an overall 93.6% net enrolment rate with gender parity. In this Middle Income Country in southern Africa, attention now focuses on other MDGs and within the education sector, on secondary education which is lagging behind at 49.5% net enrolment. Against this positive picture is a contrast: the country is besieged by a very high HIV prevalence rate of 19.9% among pregnant women and is in the “impact stage” with increasing mortality. Reversals in health indicators have just recently been revealed with Maternal Mortality increasing from 271 per 100,000 live-births in 1991 to 425 in 2006 with similar trends for Infant and Child Mortality. Life expectancy has dropped from 63 for females and 59 for males in 1991 to 50 (females) and 48 (males) in 2001.

A new phenomenon, never before encountered in human history, the numbers of children orphaned or made vulnerable by HIV/AIDS are swelling at an alarming rate. The 2001 Census found that 12% of children below 15 years have lost one or both parents and 24% of households with at least one child orphaned. By 2021, one-third (30%) of the child population or 10% of the total population will most likely be orphans. As traditional coping mechanisms by extended families are getting stretched, affordability for basic education is a growing concern. Even though the enrolment and school-leaving data in Namibia does not reflect any reversals, there is growing evidence in other countries in Sub-Saharan Africa that orphans have higher risks of school drop out than non-orphans and that affordability is becoming a major stumbling block as relatives are unwilling to invest in the extra children they have taken into their households.

Despite provisions to exempt poor families from paying the School Development Fund fees set at school level, the SDF is noted as a major barrier for access and retention for both primary and secondary school. One policy provision has been made for ensuring access to education for OVC within the framework of a recently launched 15-year programme called the Education and Training Sector Improvement Programme (ETSIP). The Education Development Fund will provide schools with funds to off-set the exemption of SDF for individual needy learners based on applications. After piloting in 3 regions in selected primary and combined schools with UNICEF support, the EDF will be expanded to two more regions next year with initial funding allocated at N$2 million (US$ 330,000).

In a review of the pilot indicates that only 12% of children identified by the schools as needing exemption and other forms of support (such as hostel fees, uniforms and learning materials) have been covered due to limited funding allocated per school. Even for the learners benefiting from the scheme, other associated costs are not covered. For EDF to have effect on school retention against the increasing levels of need, funding requirements will be far above the current allocations. The additional administrative burden and costs on the education system, especially at the school and administrative region levels, to manage the individual applications per child will also become unmanageable as increasing numbers of children become vulnerable.

From among the policy provisions and options explored, the paper proposes the elimination of the SDF with adjustments made to school operating budgets and the EDF to focus on non-school education costs such as hostel fees and transport, which are significant in the sparsely populated country requiring boarding even at the primary level in many remote areas. The cost-benefit analysis points out that an across the board elimination of the major cost barrier while covering for school operation and maintenance costs directly would yield better results than an administration-heavy case-by-case school compensation programme. Since schools in disadvantaged and remote rural areas are already operating without SDF payment for a majority of their learners, education quality is already suffering in these schools. Adjusting the budget allocation framework for schools is an integral part of ETSIP and all adjustments to the policy linked to off-set the SDF elimination are within the ETSIP. Further assessment, analyses and simulation for costing will need to be done to determine the actual costs and direct benefits of the SDF elimination and EDF mechanism adjustments.
I. Introduction and Problem Identification

Among the eight Millennium Development Goals (MDGs), Namibia has almost achieved MDG 2: “Ensure that all boys and girls complete a full course of primary education”.\(^1\) Having attained primary school net enrolment of 93.6% with gender parity, attention in the country focuses on secondary school access and completion, which lags behind at 49.5% and on quality and efficiency concerns for General Education (12 years of “basic” education).\(^2\) With MDG2 “covered”, efforts are concentrating on the other more challenging goals such as HIV/AIDS.

This paper will question whether it is prudent to rest on the laurel of near achievement of universal primary education, especially in the context of the multiple impacts of HIV and AIDS. The concerns of heightened child vulnerability to poverty with increasing deprivations for children orphaned or made vulnerable by the epidemic require special attention and potentially, new policy instruments.

Located in southern Africa, Namibia is a land of many contrasts:

- The stark beauty of its landscapes of open savannahs and majestic sand dunes belie its harsh environment for a majority of its population to eke a living from the arid soil.
- Its population of 1.83 million (2001) is "manageable" for achieving social goals; yet it is spread out so sparsely (2.2 per sq. km. density) with a myriad of need to reach pockets.
- Classified as a lower Middle Income Country (MIC) with US$2,156 per capita GDP (2003), Namibia is one of the world’s most unequal societies with a Gini Coefficient of 0.604 with 35% of the population living on less than US$1 per day and 56% on less than US$2 with 42% of the rural population living in poverty.
- By per capita GDP ranking, it stands at 56 of 175 countries, while the ranking drops to 124 on the Human Development Index (HDI) which factors in the social dimensions.

Still more complex contrasts abound. Well-endowed with natural resources (diamonds, uranium, copper, sea fish), its human and technical resources (45% of population with secondary school education and 5.9% with tertiary education)\(^3\) and its fragile and dry environment (low availability of water and electricity) hold back development potentials for value added production and manufacturing. The economic growth rate has been sluggish averaging at 4% (2001-2006) and a national deficit running for a decade with just one year (2006) in the pink. Peace and stability since independence has attracted some direct foreign investment but much of the financial capital is exported.\(^4\)

The most dramatic and emerging contrast present two seemingly divergent pictures of the country. Social development indicators (primary school enrolment, adult literacy, infant mortality and under-five mortality rates) are positive compared to other sub-Sahara African (SSA) countries. Yet, the country is besieged by a 19.9% (2006) HIV prevalence rate among pregnant women\(^5\) ranking it among the top 5 countries in the world. The pandemic is now in the “impact stage” with increasing deaths among the reproductive and economically productive age groups and there are now 167,000 children estimated to be orphans (87,587 in 2001 Census, 12% of child population under 15 years) with projections that the numbers would increase to have one-third of all children orphaned by 2021. Official Development Assistance (ODA) has been decreasing due to the country’s MIC status. While new, short-term funding has come for HIV and AIDS (Global Fund for HIV/AIDS, Tuberculosis and Malaria and the US Government Presidential Emergency Programme for AIDS Response – PEPFAR), the ODA trend goes against the possibility of an overall reversal in the gains made since independence.
Evidence confirming these concerns is just emerging. Preliminary data from the 2006 Demographic and Health Survey (DHS 2006) has revealed an almost doubling in the Maternal Mortality Ratio (MMR) of 425 per 100,000 live births from 271 in 2000. Infant Mortality has reversed from the success in reducing the 1992 level (67 per thousand live births) to 38/1000 LB in 2000 to the current increase to 46/1000 LB. Under-five Mortality has increased from 62 per thousand live births in 2001 to 69 in 2006. While there is no sign of change in the education data on enrolment, drop-out or completion rates, given the increasing numbers of children orphaned and made vulnerable by HIV/AIDS and with its multiple impacts, particularly on families and on the education system’s capacities, questions arise: is there a potential reversal looming in the education sector for both primary (Grades 1-7) and secondary education (Grades 8-12)? If so, are policy provisions and instruments in place to counter this threat?

Even before the threat of AIDS, foundations were well laid with pro-poor and high social investment policies introduced since Independence. The Government has consistently spent an average of 25% of the annual budget on education to rectify the inequities of the “Bantu Education System” inherited from the apartheid era. Government commitment and priority given to Education is thus clearly evident which amounts to 9% of GDP, the largest share of all sectors. Ensuring access to primary education was assured through school construction and teacher training at scale. Furthermore, the Ministry of Education was (and still is) the only Ministry to have undertaken an assessment of the impact of HIV/AIDS on the sector in 2002.6

Indeed, there is an impressive array of policy provisions and instruments for achieving MDG2 on universal primary education:

1. Exemption from payment of the School Development Fund (SDF) fees for poor children (2001)
2. Education Development Fund (policy 2001, established 2006)
4. School Feeding Scheme for schools in poor, remote areas (1991)
5. HIV/AIDS Policy for Education Sector (2005)
6. Education and Training Sector Improvement Programme (ETSIP, 2006)
7. Education Sector Policy for Orphans and Vulnerable Children (draft)


All these instruments fall under the umbrella of the National Development Plans striving to achieve the overall Vision 2030 goal of attaining high income country status.

Hence, the ultimate question is: Are current policy provisions to achieve the Millennium Development Goal on Universal Primary Education adequate in the context of HIV and AIDS? If the analysis leans towards a more negative perspective, a second question would arise: What additional or alternative policy option should be considered?
A key factor to keep in mind is that many of the policy provisions are not complemented with definitive budget allocations. To undertake a thorough analysis of the range of issues and policy provisions would require extended research. Within the parameters of this paper, focus will be on the two key education sector policies that have current budget provision and future fiscal implications: the exemption for payment of School Development Fund (SDF) fees and the Education Development Fund (EDF). Other policy options, which have bearing on education access and retention, will also be examined. These are the Child Welfare Grants and the Pension Grants, both of which are direct cash transfers.

II. Problem Analysis

Questions on reliability of data and the time lag between data collection to compilation and analysis have challenged policy makers and planners. Whether these perennial problems are at play or not can be debated inconclusively. Consequently, policy makers have go by “what we do know” with some assumptions made for factors not evidenced with data. These were the parameters for the development of the Education and Training Sector Improvement Programme, done with technical support from the World Bank. A thorough assessment and analysis process was done which concluded that the main challenge in General Education (GE) to bring Namibia to a level of knowledge-based economy lies in bringing up access and retention at the Secondary level with closer attention to quality at the primary level and overall efficiency and effectiveness of GE. The impact of HIV and AIDS is being addressed with provisions for OVC access to and retention in education through the establishment of the Education Development Fund (EDF).
As Figure 1 shows, net primary school enrolment has steadily increased and has stayed slightly above 90% since 1995, while the secondary level remains below 50%. The attainment of full gender parity at all levels of GE with girls showing a slightly higher level of enrolment and retention is a remarkable feature of the country’s achievements in education.

Survival rates for both girls and boys to grade 7 (primary) is about 85% while only 57% make it to grade 10 with the same trends in school leaving (drop-out) rates. Any analysis of school retention and completion must consider other contextual variables for school attendance. The issues of affordability, opportunity costs, academic performance, teacher qualifications, absenteeism and quality of teaching-learning in the dynamics of “push and pull” from the education system all play critical roles. Whatever the combination of factors has been for Namibia, the trend is clear, showing that the demand for primary education (up to grade 7 for both girls and boys) has been high, matching the supply provision by the government. The trend for the secondary level has also been consistent at a lower level, where other factors come into play.

As Figure 2 shows, Grade 10 is where the system loses the bulk of its learners, when national exams determine transition to higher secondary school. For many years, the “failure” cut off grade had been determined based on the space available in the limited number of classes at the senior secondary levels. Apart from academic performance and school availability, higher costs of secondary education (including hostel costs and exam fees) become a more critical factor.

The multiple impacts of HIV and AIDS on Namibia now needs to be factored into the analysis. Namibia is among the top 5 worst hit countries in the world. Although prevalence is beginning to level off, the country is now squarely in the “impact stage” of the epidemic. The most dramatic impact has been on overall life expectancy, which has decreased from 61 in 1991 to 49 in 2001 and projected to be 42 by 2007. With increasing deaths among the reproductive age group, the number of orphans is steadily increasing, with projections to reach one-third of all children by 2021 or 10% of the total population. This phenomenon on the scale of orphans in Sub-Sahara Africa is unprecedented in world history and there are no proven solutions for policy makers and programme designers to draw from.

A closer look at the data reveals a more serious situation in the context of child vulnerability to poverty:

- 61% of orphans are cared for by a grandparent, with 21% by other relatives and 4% by a sibling.
- 88% of orphans are school going age (6-17 years).
- The majority of the orphans (75% of dual and 82% of single parent orphans) live in rural areas.
- 24% of households have orphans in their care with half the per capita income of those without orphans.
Coupled with the fact of 42% rural poverty, the proportion of orphans and those made vulnerable by HIV and AIDS are significantly higher in rural areas. Rural schools are also more disadvantaged in terms of resource allocations and many of them struggle to cover operating expenses with a majority of learners not paying the SDF. 10 HIV prevalence varies significantly across the country and so do the levels of poverty.

From among the 13 regions of the country, those with the highest HIV prevalence rates are mainly in the north (Caprivi, Kavango, Ohangwena, Omusati, Oshana and Oshikoto) with urban and migrant labour areas in the central and southern regions at similar levels (Windhoek in Khomas region, Walvis Bay and Swakopmund in Erongo region and along the southern border in Karas).

Regions with the highest levels of poverty are in the north: Kavango (50%), Omusati (47%), Oshikoto (47%) and Caprivi (45%). 11 On the supply side of the education system, the regions with the lowest levels of resources (quality of facilities, qualified teachers) are also in the north: Caprivi, Kavango, Oshana, Ohangwena, Omusati, Oshikoto and Kunene. 12 There are clear overlaps in these 3 dimensions.

While no data is available on the scale of child-headed households and the proportions of orphans to non-orphans in schools, the fact that there is a time lag in the impact of the disease and the increasing burden of care (for the sick and dependency ratios in extended families), the threat of a reversal in educational trends is likely to emerge in a few years’ time. The reversals in infant, under-five and maternal mortalities are already evident and alarming. When these negative impacts will become evident in other social and economic productivity data is a question of time.

Although Namibia’s data does not reflect the impact on education outcomes, other SSA countries with comparable HIV prevalence rates have evidence of such an impact. Access and retention in primary education is lower for orphans than non-orphans and affects girls more than boys, given the burden of care falling on the shoulders of women and girls. A study in Zimbabwe found a gap of between 3-6% in the primary school attendance rates between orphans and non-orphans. Children who had lost both parents were less likely to be in school with a ratio of .89 to 1. 13
A Rapid Assessment, Analysis and Action Planning (RAAAP) exercise on the OVC situation in the country undertaken in 2004 indicated that schooling costs are of priority concern to orphans and their care-givers. Qualitative studies have confirmed anecdotal information NGOs and Ministry of Education (MOE) sources that inability to pay the SDF fees, which are set by each school within a nationally defined ceiling, is becoming a major constraint. While provisions for exemptions are available and have been simplified, they are still too cumbersome, costly or not known, especially for elderly grandmothers.

The National Survey on Barriers of Access to Education in South Africa found that school financing and school governance influence access. Studies show that the costs of school fees, school transport, and school uniforms inhibit access for poor families. Transport costs become particularly high for secondary school learners who may have to travel long distances or stay in hostels. In households surveyed in Thembelihle, South Africa, expenditures on education ranged from 32% of the average household income to close to 100% for families at the lowest end of the income groups. School access costs were clearly placing huge burdens on poor families.

In Namibia, a USAID-supported project study reports that a majority of school principals claim that children require food, clothes, school uniforms, and stationery to stay in school. In a study of faith-based organizations’ programmes for vulnerable children, children reported needing in order of priority, school fees, school uniforms and food. Risks to educational enrolment and retention are found to include: poverty; illness in the household; being sent to another household; extended family taking more children into the household; and, maternal death. Orphanhood is not the key determinant, as vulnerability begins before the death of a parent with caring for the dying and increased material and emotional deprivations caused by ill-health and loss of income earning capacity of the adult.

HIV/AIDS is also affecting the education sector from the supply side. Teachers, administrators and support staff are infected and affected. Teacher absenteeism and attrition are being studied and ways to address these dimensions will also determine education results. Ultimately, all the dimensions of the impact that impede on education sector objectives must be addressed simultaneously, including ART access for teachers and other personnel, teacher replacement training, a relief teacher system and other sector administration and improvement mechanisms.

In 2006, the GRN embarked on a 15-year Education and Training Sector Improvement Programme (ETSIP) to have the education sector contribute to the achievement of the national
Vision 2030 target that “Namibia should join the ranks of high income countries and afford all its citizens a quality of life that is comparable to that of the developed world”. V2030 calls for rapid economic growth with equity, transforming the economy into a knowledge-based economy. Since the pace of economic growth is far short of getting the country towards V2030 target, attention is now on productivity growth. Higher value added productivity is expected to increase Namibia’s gains from export of its natural resources and expected to improve local investment returns, and thereby reduce domestic capital flight.  

Thus, the primary aim of the ETSIP is to substantially enhance the education sector’s contribution to the attainment of strategic national development goals and to facilitate the transition to a knowledge-based economy. The programme gives priority to the creation and application of knowledge and technology to improve the range and value of products in order to address the current shortage of skilled labour. Hence, the focus in General Education is on secondary level access and completion with limited attention to primary education (quality focus and some resource re-distribution).

Within the wide framework of the ETSIP, addressing the impact of HIV and AIDS on children’s access and retention to education is included in a cross-cutting component with limited estimated requirements, rather than addressed under General Education, where the main feature (with the largest share of estimated requirements) is on expanding secondary school availability. What is evident in the above analysis is that becoming an orphan puts both primary and secondary school-age children at risk of dropping out of school. Expanding secondary school facilities and improving primary school teaching/learning quality will not be enough to bring up secondary enrolment in this new context of the multiple impacts of HIV and AIDS, unless the affordability issue is also addressed systematically.

In conclusion, in analyzing the OVC phenomenon in the context of vulnerability to child poverty and in applying the Welfare Pentagon, the burdens of HIV and AIDS on traditional coping mechanism is causing “failure” of three of the five channels: the family, social networks and markets. The two channels left for ensuring child welfare are the church networks as a “membership institution” and “public authorities”. Public policies and instruments are therefore more critical for preventing or mitigating the child poverty deprivations in the nine domains: income, education, nutrition, health, shelter, water and sanitation, labour, leisure, social inclusion and protection. While this paper focuses on the potential deprivation of the dimension of the right to education, they are inter-related and have impact on education outcomes. Malnourished, hungry and frequently ill children are less likely to enrol or complete basic education and this in turn leads to the perpetuation of intergenerational poverty.

III. Policy options and instruments

The policies listed in the Introduction have many provisions to ensure pro-poor education access and retention. Most are statements of intent with a few having specific fiscal provisions. While policy provisions to fulfil government obligations for the right to education, in the context of the impact of HIV and AIDS on the education system, cover supply side requirements such as availability of quality facilities, teachers and teaching-learning materials, this paper will focus on the demand side issue of affordability in the context of the growing burden of care.
Of the social protection policies with budget provisions, three merit closer review as they have direct bearing on affordability of education:

- the long-established provision of fee waiver/exemption for paying the SDF for poor families;
- the newly established EDF, included in ETSIP, which are funds paid to schools for allowing for children to be exempted from paying SDF and for other associated uses to benefit orphans and vulnerable children;
- cash transfers such as the child welfare grants administered by the Ministry of Gender Equality and Child Welfare (MGECW); and, the long-established universal pension grants for those over 60 years old, administered by the Ministry of Labour.

In addition, the school feeding scheme for schools in disadvantaged areas as an in-kind transfer and other small-scale interventions in some project sites are relevant to this analysis. However, given the space limitations of this paper, only two non-education sector provisions, which use demographic targeting and which have relatively high coverage, will be reviewed. The child welfare and pension grants, which are direct cash transfers, are reportedly used for educational costs at the household level.

These three sets of policy provisions and instruments are explored below as options to address the issue of rising real and opportunity costs of education.

1. **School Development Fund fee waiver**: The SDF is meant for schools to generate funds to cover costs not included in the limited operating budgets allocated to public schools and some government-subsidized private schools. The allowed uses of the funds are to “provide, develop and improve reasonable and necessary facilities (and provide for) education, sport and cultural activities”. School Boards/Principals set the amount within a maximum ceiling of N$250 (approximately US$ 40) per learner in primary schools and N$ 500 (US$ 80) in secondary schools. They are also authorized to give exemptions to families who cannot afford to pay based on an application. 21 Formal exemptions are generally noted to be limited (estimated at 2% of all learners, primarily in urban schools) 22 as the procedures are cumbersome with high transaction costs for both schools and households. Furthermore, there is asymmetric information regarding the exemption as many caregivers are unaware of the provision or of procedures to obtain the exemption.

Rural schools in disadvantaged areas report that a majority of their learners do not pay and they struggle to cover operation costs. Conversely, children and caregivers report that they are repeated warned by their teachers or principals that they cannot attend without payment, despite the proviso in the guidelines that no child should be denied entrance or continuation of schooling because of non-payment. 23 Exemption requirements include a letter from a traditional authority confirming that the family is indigent and there are anecdotal information of rent seeking behaviour of such authorities. For orphans, death certificates of parents are required which is also difficult to obtain.
Even with the exemption or non-payment, other costs can be equally prohibitive. Hostel lodging is necessary for many primary and secondary school students given the vast distances. While only data on the number of boarders staying in government hostels is available (43,000 or 8% of GE learners), the proportion would be much higher when community-run and private hostels are included. Findings from a study sponsored by UNICEF in 2002 on hostel access as a barrier for OVC revealed that it is an impediment for children in remote areas at the primary level and gets more critical at the secondary level. In addition to hostel fees, uniforms, school supplies, transport and exam fees (secondary level) are all noted to be additional cost barriers which the SDF exemption does not cover.

“Shortfalls in books and stationary are much higher in rural areas (40% per learner) than in urban schools (18%)”

Since income from SDF collection varies widely, poor schools with low levels of collection suffer from inadequate operating costs and have no recourse. A study sponsored by UNICEF in 2003 revealed that in effect, the SDF is used primarily for books, equipment and maintenance. While rural schools spend a high proportion on photocopying and transport to administrative towns, urban schools spend a significant proportion on salaries for relief teachers. Shortfalls in books and stationary are much higher in rural areas (40% per learner) than in urban schools (18%). SDF thus perpetuates the disparities in quality education and is in effect covering operating and maintenance expenses which are supposed to be covered by the budget provisions for schools rather than for the intended “school development”. Most critically, the SDF fee waiver mechanism is clearly not an effective provision to ensure affordability of education access and retention.

2. The Education Development Fund was established to ensure access to all levels of education for OVC and is within the ETSIP framework. In effect, the EDF is meant to compensate schools for waiving payment of SDF fees. It is relatively new: the policy provision was made in 2001 but the Fund was established in 2006 and has been piloted in 17 primary and combined schools in three regions with UNICEF support. Currently, the 2007-2008 fiscal year, the allocation for the EDF roll-out is approximately US$ 78,000 (GRN/UNICEF) and plans are in place to roll-out the initiative to 5 of the 13 regions of the country with a provisional GRN allocation of N$2 million (US$ 330,000).

The provisions for use of EDF include:
- Educational facilities for the benefit of socio-economically disadvantaged learners;
- Assistance including bursaries to economically disadvantaged learners enrolled or to be enrolled;
- Educational programmes for the socio-economically disadvantaged learners

Schools apply for individual learners selected by the school who cannot afford to pay for SDF or hostel fees, though funds provided on the basis of individual learners can be used for other costs defined in the guidelines. Selection is left to the judgment of principals and teachers based on general criteria. The draft Education Sector Policy for OVC is defining the term “OVC” which would affect eligibility. The definition in the working draft has become more extensive on who is “vulnerable”, which will make selection more expansive and thus make targeting more difficult.

A recently completed EDF review in the pilot regions (draft report) raised some serious concerns on its viability as an instrument for large scale application:
- EDF administration is time intensive and delays in applications and disbursements were observed.
o Since SDF fees vary among schools, benefit amount per learner varied according to each school’s interpretation.
o School-based identification of eligible children is beset by the same bottlenecks as in SDF waiver such as difficulties in obtaining death certificates of parents to prove eligibility and lack of social workers; hence, the procedural requirements were not followed in most schools.
o Utilization of EDF ranged widely from beneficiary-target spending (SDF waiver, hostel fees or school-related supplies) to general materials for all learners (textbooks and learning supplies), school operating costs and maintenance.
o There were no linkages with Child Welfare grant provision and other OVC support programmes.
o There is no specific provision for EDF (line item) in the Ministry of Education national budget.
o There appeared to be no accounting and record keeping mechanisms for EDF in schools.
o An estimated 12% of children identified as OVC by the schools benefited from EDF (discounting the school that used the funds for materials for all learners).

The low level of coverage of the EDF may indicate a situation of fiscal federalism where the benefits are centrally defined and allocated but eligibility is determined locally resulting in high number of beneficiaries being identified. Alternatively, school-based identification of need may indeed be correct and depending on the location of the school, levels of need would be high.

The lack of proper accounts and accounting procedures bring forth concerns on fiduciary risks such as improper allocation of funds, fraud, failure to achieve primary objectives and inadequate oversight. Overall, EDF appears to have been used primarily for the shortfalls rural schools experience in providing quality education given the limitations in budget provision to schools.

The review, however, had several drawbacks on methodology and analysis and did not reflect some “good practices” which are commendable. In Omaheke region, out-of-school children “found” by local NGOs were re-integrated into primary school with their SDF, hostel fees, uniforms and school materials directly covered by the EDF. “Correct” targeting by selecting schools on the basis of location in disadvantaged areas and the low level of SDF collection in these “poor” schools are positive findings of the pilot stage which need to be considered in the expansion.

Since the existing administrative structures were used for EDF implementation, no separate administration costs are available. However, the additional burdens on schools and regional level administrators for submission and review of individual application forms for each child and accounting for EDF separately from school operating accounts, high transaction costs can be assumed. While it is apparent that the current mechanisms will need considerable adjustments, expansion of the EDF to all regions and schools to make a significant impact on school access and retention will have significant cost implications.

For the EDF to be effective, the review noted that the requirement would need to be estimated at 40% of the total school enrolment. However, this would not address the secondary level enrolment and retention objectives, since half the age group is out of the school system. Experience from the pilot stage is clearly showing that the implementation mechanisms have too many loop-holes which detract from it being an effective instrument to increase and/or maintain enrolment levels.
3. **Direct Cash Transfers (child welfare and pension grants):** The Child Welfare Grants (CWG) consist of several types: maintenance, foster care and special grants for disabilities and they offer a window for the education objectives. Both the maintenance (MG) and foster care grants (FCG) are disbursed monthly totalling N$2,400 (US$400) per child per annum (with a maximum of N$4,800 for 3 children per family for MG) and have a condition of school attendance. The MG is linked with a short-term in-kind food package assistance for OVC with World Food Programme support. The agreement with WFP stipulates that all food package recipients (currently 70,000) will be enrolled in the cash grant provision by 2008. However, eligibility for the MG for those who are not orphans is emerging as a challenge. The foster care grants are more limited as they have to be processed by social workers through a court order for legal appointment of foster parents. The MG eligibility demands the caregiver applicant to be a biological parent (grandparent is admissible) with the spouse (main earner) dead, imprisoned for more than 6 months or on pension and is universal for all citizens and permanent residents.

Current coverage of the CWG is approximately 80,891 (69,679 for MG and 11,212 for FCG) which increased exponentially in the past few years (from 9,600 in 2003) with greater budget allocation and increasing capacity for processing the grants. By 2011, the target is to reach 142,777 children. Access to these grants has similar draw-backs to SDF exemption with civil registration (birth and death certificates) bottlenecks and lack of public knowledge of procedures. While data is not available, the administrative and transaction costs are most likely high as applications are processed by a limited number of record clerks (one per region) and 20 social workers available in the 13 regions. They are based in regional capitals and most of the OVC are living in rural areas. Anecdotal information points to inadequacies in actual reach of OVC with some care givers using the funds inappropriately. An assessment is under discussion for 2008 to seek ways to improve efficiency, effective and minimize fiduciary risks and wastage.

With school attendance as a condition for continued receipt of CWGs, they offer a window of opportunity for ensuring school completion. School progress reports are supposed to be submitted for every term for continued receipt but actual enforcement is difficult. Normally, non-compliance is noted only in sporadic checks. No official links are established with the school system, even though some principals/teachers are noted to have facilitated application for the grants.

Old Age Pension grants are now administered by the Ministry of Labour. The unconditional grant of N$3,600 per annum (US$600), made as a universal provision for all adults over 60 years residing in the country (citizens and permanent residents), has been operating since 1992. With 127,500 beneficiaries, 99.5% of the age group is covered. Anecdotal information notes that grandmothers use their pension to pay for SDF and other education costs as well as for child care, leaving little for their own needs. Drawbacks on linking to this well-established programme with high coverage are that not all OVC are in the care of elderly and the given their remaining life span, how orphans in their care can continue to benefit have to be considered.

Both the Child Welfare and Pension grants have much higher coverage than the EDF at present and are said to contribute towards education expenses. They share common disbursement mechanisms through banks, postal system or a state-of-the-art technology using a sub-contracting agency which has been noted as efficient and effective. OVC vulnerability to poverty and deprivation has a much wider range than education and hence these grants, with relatively low benefit levels for extended families with a high dependency ratio due to HIV/AIDS, need to cover other basic needs such as food, shelter, clothing, health care and transport. Capacity constraints of the MGECW for scaling up the CWGs are being addressed with a new cadre of personnel at sub-regional levels. At present, the
processing time and case load for the few social workers and clerks prohibit taking on any additional
demands such as specific targeting, monitoring and enforcing the conditionality linked to education.

IV. Proposed Policy Options

Of the policy provisions reviewed above, the two provisions in the education sector are directly meant
to address affordability of education and are inter-linked. As the analysis reveals, both are apparently
inadequate to address the challenge of a massive increase in the number of vulnerable children. Based
on the findings of three studies commissioned by UNICEF in support of the Ministry of Education: on
hostels (2002), the SDF (2003) and EDF pilot (2007), as well as the ETSIP provisions, the following
policy adjustments are proposed:

The abolishment of the School Development Fund combined with revised operational cost
provision to schools (planned under ETSIP) and a targeted Education Development Fund,
focusing specifically on OVC to cover non-school education expenses.

This set of policy options will need to be accompanied by system adjustments, all of which are within
the ETSIP component and sub-component activities and are according to the OVC policy and
National Plan of Action provisions.

SDF abolition associated adjustments should include:

- School operating costs should be assessed and standard allocations made per school size and
  locality, if in a disadvantaged area. This is according to ETSIP GE component 6 on “equitable
  pro-poor distribution of resources which will introduce normative per capita financing to enable
  schools to acquire resources that meet set input norms” including facility development and
  maintenance costs. The adjusted school budget provision could be set at a level adequate to off-
  set the SDF income at a standard pro-rated range rather than the local community affordability
  criteria used by schools.

- All teaching-learning materials which are centrally budgeted and
  provided to schools need to be
  streamlined and made functional
  so that schools would not need to
  seek local funding to cover these
  costs. This provision is in line
  with ETSIP GE component 3 on
  “books, textbooks and teaching
  materials” which include an
  activity to undertake a baseline
  on the current situation.

EDF adjustments associated with SDF abolition would include:

- The EDF provisions should be re-defined to focus directly on OVC (with clear eligibility criteria
  for targeted selection) to cover costs associated with education such as uniforms, stationary, exam
  fees, hostel and transport (for school breaks).

- Linkages should be specified with the Child Welfare grants to increase access to the cash transfer
  for children identified by the schools as needing assistance and a stronger follow up on the current
  conditionality of school attendance. This could include channelling assistance through schools in
  cases where an identified recipient is not attending school (similar to the observed EDF good
  practice in Omaheke region to re-integrate school drop-outs.)

- Geographic targeting is also proposed to direct limited resources to schools in high HIV/OVC
  prevalent regions and/or poverty levels, with exceptions approved on a case by case basis for
  pockets of poverty in better off regions or urban schools in resettlement locations. Selection of
  eligible schools can be linked to the school feeding scheme for which targeting mechanisms are
  also being reviewed.

Cost-Benefit Analysis: The arguments for the elimination of SDF with the above adjustments are
based on global evidence on elimination of user fees, that they are onerous on poor families, difficult
to administer waivers, generate exclusion and generate little additional revenue. With the elimination of SDF, Child Welfare or Pension grants would not be needed to pay these fees and can cover other child poverty deprivations such as material, nutrition, health, shelter, water, sanitation and protection. The abolishment of the SDF fees would benefit all public school learners. However, it is only one part of social protection where other challenges require that the policy be accompanied by other measures such as cash transfers and school feeding programmes.

The introduction of EDF as a parallel scheme to compensate schools for SDF fee waiver when the SDF was in effect, compensating for inefficiencies of the system, is proving to be an inefficient way of addressing two separate issues: user affordability and school operation. The benefits of the SDF abolition with direct financial provision for school operations are two-fold:

- for the education system, it would lower transaction costs in schools in the constant pursuit of SDF payments and of processing waivers while trying to make ends meet to operate the school and offer quality education.
- for users, a major impediment would be universally lifted for households taking care of additional dependents and for vulnerable households. Since all users of the public school system are primarily among the lower quintiles of income poverty, this single measure would have major impact on poor households.

**Figure 7: Primary school enrolment up-take after abolition of school fees:**

As evidenced in four SSA countries shown in the graph above, the elimination of user fees had a dramatic and direct impact on increased school enrolment. While the SDF elimination may not show a major up-take of primary school enrolment given its already high level in Namibia, it would prevent drop-outs and would have greater effect in the transition period from primary to secondary school as found in the cash transfer programme linked to education in Mexico. If linkages are established with CW grants, re-integration of children who have dropped out and greater targeting can be made for “educationally marginalized children” such as farm workers’ children as well as San and Ovahimba minority groups.

The benefits in adjusting the EDF are more complex. While the pilot of EDF has encountered some administration issues, its appreciation by schools and communities was well noted in the review as a much needed scheme in the context of growing numbers of children made vulnerable by HIV and AIDS. The elimination of SDF alone would not be adequate for the poorest and most vulnerable households, especially female-, elderly- and youth-headed households. The non-SDF costs feature more prominently in senior primary and secondary levels where opportunity costs to education and additional costs enter the balance sheet, such as hostel and exam fees. The EDF, as it is currently administered, appears to place a heavy burden on schools and additional management load on regional school inspectors. Individual application forms are onerous to fill such that many pilot schools did not comply. The range of possible uses for the funds, provided on an individual learner basis, for school development purposes can detract from the aim of school enrolment and retention.

**Cost estimates:** Pending the development of the normative financing framework for schools under ETSIP, one could use available data on SDF collection to determine the level of need in schools for provision of quality education according to norms.
At the primary school level, actual fees range from N$5 (US$0.83) per annum per child in a rural area to N$1,380 (US$230) in an urban school. In general, despite the ceiling, SDF is almost 10 times higher in urban areas with 75% of schools surveyed charging less than N$400 (US$66) while 75% of rural schools charging less than N$22.50 (US$3.75). User affordability appears to be the main criteria for the fees being charged by schools rather than actual operating expenses.41

One attempt at estimating SDF contribution arrived at over N$100 million annually (US$16 million) based on a sample size of 90 schools in 7 of the 13 regions. This estimation is likely to be generous given the small sample size but if correct, it represents approximately 5% of the Ministry of Education annual budget.42 Since 25% of urban schools demand SDF above the ceiling, the required amount for schools to meet norms can be estimated from the maximum allowed ceilings of N$250 per learner per annum for primary and N$500 for secondary schools. At this level, the estimated cost could be N$175 million (US$29 million) to “compensate” schools for the loss of SDF income at a generous level. However, the estimated cost would best be done using the normative financing framework as planned under ETSIP.

**EDF Requirements:** Using the national poverty rate of 35% as a benchmark, 63,000 children of the approximate 180,000 orphans under age 15 (2006) can be estimated to need assistance to enter or stay in school. If the benefit level is based on the mid-range of the primary and secondary school maximum allowed ceiling of N$250-500 (US$40-80) per child per annum for the SDF for primary schools and standardized for all ages and school levels; i.e. **N$400 per child. N$25.2 million (US$4.2 million) would be required for the benefits alone for one year.** However, cost calculations would have to factor in leakage and administrative costs, adjusted for inflation to maintain purchasing power over time and the increase in the number and proportion of OVC as projected for the coming 10-15 years. Since actual OVC numbers are not available and no registration of OVC is taking place, this may be difficult to administer as well as introduce elements of stigma in schools.

A more detailed estimation, based on region-specific poverty ratios, allows for phasing the roll-out of EDF according to priority determined by the poverty ratio and/or HIV prevalence (proxy for levels of burden of care and OVC). The rough estimates using household proportions to number of learners need to be noted since the number of vulnerable children may be higher as extended families living in poverty in the context of AIDS would have higher number of dependent children.

**Figure 8:** Cost estimates based on level of poverty (with HIV prevalence & education resource poor status noted).43
education access and retention may be very low if family income earning and productive capacity diminishes with heightened impact of HIV and AIDS. Administrative costs may be higher in the screening process for eligibility as income poverty is hard to discern through the school system. For specific targeting on those in extreme poverty, proxy means testing may be an option but would be cumbersome for the school system to administer.

- If the EDF is targeted at a wider “relatively poor” group, the numbers multiply to 176,836 beneficiaries and N$70,734,400 (US$11.790 million) per annum at current rates. This may be excessive since the SDF abolishment would already lower needs of many households for education costs. Also, it may involve a much higher wastage rate and a high inclusion error (though probably a corresponding low exclusion error) though screening costs would be less than in the other option of targeting those in extreme poverty.

These two sets of options are offered to policy makers to consider. There are clear trade-offs between the two options and actual costing simulations will need to be done as the process is dynamic with factors changing over time to be considered in the actual setting of the benefit level and targeting criteria. With the deepening effects of HIV and AIDS on extended families and their diminishing capacity to earn and produce, the demand for OVC education may diminish as well. Those in the “relatively poor” category are vulnerable to shocks and targeting only on the smaller group of extreme poor will not be adequate to maintain and increase enrolment and retention. Other targeting options need to be considered in addition to economic poverty criteria.

**EDF Targeting:** Other options can be considered by choosing geographic coverage for EDF. If the top 7 regions with a combined (extreme and relative) poverty levels above 30% of households (which are also classified as “education resource poor” regions in ETSIP) are targeted, the beneficiary numbers come down to 140,031 at N$56 million (US$9.3 million). Other parameters of geographic targeting may be considered such as selection of schools in disadvantaged or remote locations, serving poor communities, linked to the school feeding programme or high HIV prevalence areas (with higher than 15%). A range of selection parameters, which could make the EDF more affordable and targeted to those in greatest need, are available. These include:

- selecting schools which qualify for school feeding;
- targeting all rural schools;
- application of on-going regional poverty profiling and mapping to identify pockets of poverty;
- selecting schools in high HIV prevalent regions (northern regions, urban areas of central regions and high labour migration areas in the southern regions) which match those identified in ETSIP as resource poor regions for education (primarily northern regions) plus selected urban schools in informal settlements and remote rural schools in the southern regions.

Ultimately, school location-based selection may be the best option with linkages made to the school feeding programme which also follows this approach. This will ensure a more nationally balanced and equitable pro-poor distribution of resources.

Finally, in EDF targeting, concerns of “stigma” need to be considered. According to the apparent high demand for Child Welfare grant application and rapidly increasing levels of provision, the issue of stigma of recipients does not appear to be significant. However, school-based selection processes for specific learners entails a “naming” of beneficiaries in the school (as is the case in the current application of EDF in the pilot schools). This aspect requires deeper understanding to avoid any adverse effects of a well-intentioned scheme. Furthermore, operational linkages with the Child Welfare Grants need to be made to avoid two parallel systems.
**Monitoring and Evaluation:** To support the decision making process on abolishment of the SDF, a rapid community survey can be done on the barriers to school enrolment and retention for both primary and secondary levels. This will provide the Namibia-specific evidence on how SDF is an impediment for poor households. Following the issuance of the directive to schools, compliance to the abolishment of SDF in schools will need to be monitored by the school inspectorate system.

EDF implementation will require a much more elaborate monitoring and evaluation plan on actual benefits reaching the intended target. Overall monitoring of education enrolment and retention will continue to be within the Education Management Information System (EMIS) which is being enhanced through the ETSIP management improvement component. Key indicators would be net enrolment and completion rates for both primary and secondary levels and at school level, child-based attendance and learning outcomes. Special attention will need to be paid to high OVC/HIV prevalent regions, education resource poor regions and schools serving remote and/or poor communities in terms of school leaving/drop out trends.

While the baseline would be the annual net enrolment rates for all levels of GE for the academic year prior to the elimination of SDF and expansion of the adjusted EDF system, the potential of reversals in the positive trend needs to be closely monitored at school level. The rapid review undertaken on the EDF pilot needs to be done more systematically in 2008 to evaluate the expanded programme in the 5 regions. The evaluation will need to include administrative and transaction costs for schools as well as selection processes in schools. Based on this more thorough evaluation, adjustments will need to be instituted along the lines suggested above to set the benefit amount and targeting criteria.

**Recommendations:** The abolishment of the SDF will be a popular public interest intervention. However, for the government to arrive at this decision, further calculations and cost simulations should be undertaken within the framework of ETSIP implementation. It is essential that the school operating costs are adequately covered by the system before abolishment so that quality education provision is assured and enhanced in the resource poor schools.

For a more focused and better targeted EDF provision, the evaluation after the second year of the current EDF initiative as suggested under Monitoring and Evaluation is essential. The intervention as it exists now leaves far too many loop-holes for it to be an effective tool for access and retention.

Other measures to counter the impact of HIV and AIDS on the education service delivery capacity are essential to address education outcomes from both the supply and demand sides. Furthermore, efficiency measures for the education sector as outlined in the ETSIP need to be implemented simultaneously to create the fiscal space and sustainability within the sector budget allocations for managing the impact of AIDS before a greater share of the national budget can be sought.

Finally, an assessment of the Child Welfare grants (re. access, actual reach for intended beneficiaries, monitoring of the conditionality on school attendance) would help the decision making process regarding EDF system improvements. If the CWGs are well implemented (with higher investment in their administration for tighter eligibility selection and monitoring) with clear links to the school system, the EDF may not be needed and the SDF abolishment alone may be adequate to address the issue of education affordability. Economies of scale of having one set of cash transfers for vulnerable children’s range of deprivations (i.e. nine domains referred to earlier) would be more cost-effective than having a smaller parallel programme for the education sector. The
budgetary provisions for CWGs appear to be clearly on the increase with expressed commitments made to their expansion. The overall aim should be for synergy of policy provisions across the sectors for child vulnerability to poverty and deprivations due to the impact of HIV and AIDS.

V. Conclusion

The premise of the paper may be challenged given the current evidence on net primary enrolment but the evidence on the impact of HIV and AIDS is equally clear of the probability of the rates declining. When viewed with a child rights perspective, protecting primary education and supporting the promotion of secondary education will first address the right to education which is in turn catalytic for other rights. The fundamental principles of a child sensitive social protection system are that it:

* Promotes a coherent legal framework to protect the rights of women and children;
* Addresses the age and gender specific risks and vulnerabilities;
* Intervenes as early as possible to prevent irreversible impairment to children;
* Makes special provision to reach children who are most vulnerable;
* Helps children and women to claim their rights; and,
* Strengthens the capacity of the state, communities and families to respect, protect and fulfil rights.

The critical principle in the Namibia scenario for primary education is to “intervene as early as possible to prevent irreversible impairment to children” and to stem the perpetuation of inter-generational poverty due to the multiple impacts of HIV and AIDS. Primary education is the foundation for the achievement of ETSIP’s aims to actively contribute to the Vision 2030 goal of a knowledge-based economy with value-added productivity. Current trends show a remarkably solid foundation. To plan effectively for Vision 2030 requires looking forward, factoring in the contingencies so that the systematic actions are taken and efficient allocation of resources is made. The reversals in life expectancy, maternal, infant and child mortality rates are alarming and will take several decades to regain the set-backs. Oftentimes, responses to changing trends come in a delayed reactive mode. This paper emphasizes the need to pre-empt than to re-act.

These same measures aimed at MDG2 on primary education would complement and contribute to the “pro-poor expansion of secondary education” as well as the pre-primary school/early child development expansion components of ETSIP. The issue of affordability is even more critical for older children where the push to become an income earner and opportunity costs of education are more pressing. Expanding school availability alone would not achieve the aims of increasing secondary enrolment and retention, in the context of HIV and AIDS. Thus, the policy adjustments proposed here are equally essential for the ETSIP goals for secondary education.

Achieving MDG2 in 8 years’ time is a fundamental step towards achieving Vision 2030 in 22 years. Towards these meritorious ends, Namibia will need to stay ahead of the curve of the glaringly obvious trends in the number of orphans and the effects HIV/AIDS is having on child deprivation, poverty and loss of rights. If the Government waits until the primary net enrolment rates drop, as argued in this paper, hundreds or thousands of children would have already dropped out of the school system before counter measures are put in place. Namibia has been known to have forward-looking policies and the effort to introduce the EDF is an example of staying ahead of the curve. A further refinement of these policy provisions, as proposed in this paper, is essential to make them cost-effective to ensure access and retention for all children for the full 12 years of General Education.

“There is a need to pre-empt than to react to the reversal.”
End Notes

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