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Study of non-state provision of education in Maputo
Final Report

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Abstract

1. The report presents and discusses the findings of an investigation into the types of non-state engagement in and provision of education in two low-income areas of Maputo. Data was collected in October 2015 on all non-state schools found, serving pre-primary to upper-secondary (*preuniversitario*) levels. The report finds essentially no 'low-fee private' schooling as exemplified in other African and Asian contexts. Instead there is a very limited number of non-state providers serving lower-middle and middle class clients. The largest role for non-state provision is found to be at the pre-primary level where there is virtually no public provision at all.

Executive Summary

2. In an international context of growing interest in the non-state provision of education at all levels from pre-primary to upper secondary school, UK-DFID Mozambique was motivated to learn about the non-state sector in Maputo. Until now there has been hardly any documentation on the sector in this context.
3. This study presents results of a census of non-state schools (including purely private, community, and church mission-supported schools some of which receive government support in the form of deployment of civil service teachers) in two low-income areas of Maputo, one with somewhat poorer socioeconomic indicators than the other. A survey was administered to all cooperating schools found. No sampling was necessary as the census reveals only 53 non-state schools in these two neighbourhoods.
4. The study finds that the only notable growth of the private sector is at the pre-primary level, where 13% of schools have opened in 2015. It is also the only level where individual, private proprietors are the predominant type of school owner. This growth at the pre-primary level indicates a clear demand that is currently entirely unserved by the government sector. Yet private provision is well out of reach of the poor - an issue that must be addressed in the interests of children's learning from primary grade 1 onwards, and decreasing social inequity. While all pre-primary provision is in the private sector those who can pay will be able to access considerable advantages compared to their poorer peers.
5. Non-state provision at the primary level is extremely rare as nearly all people choose to use the fee-free government sector (while the numbers of pupils are more than at the pre-primary level, it must be remembered that this covers 7 schooling years, while pre-primary covers only 1-2, plus crèche). At the secondary level the presence of non-state schools increases drastically, however the sector has not been growing and few but often very large schools were found. Few pupils in Mozambique reach the upper-secondary or *preuniversitario* level, and so the non-state sector at this level is relatively small.
6. Fees at these schools put them well out of reach of the poor, however some levels at some schools were nearly fee-free due to the school being staffed by government-paid civil service

teachers. Schools are nearly all registered with the relevant authority and facilities are relatively good.

7. In terms of education market competition and proprietors' reports of the obstacles and challenges they face, some schools report access to credit and not knowing better methods of accounting and school management as key obstacles. However due to the small numbers of schools existing in the market, perceptions of competition to attract parents and pupils were not particularly strong. Many report that there are too few similar schools in the area for there to be much competition, or they reported that other schools were not of the same quality level and therefore not comparable.
8. The study finds that the pre-primary sector is arguably the most suitable sub-sector for investment through public-private partnership, and possibly at the secondary level also, but that support to parents' purchasing power would be necessary to boost effective demand. It appears that expansion of fee-free government provision would be most equitable in light of the realities for low-income families in Maputo. However failing this, providing that fee payments are subsidised, non-state provision could help to expand access to the crucial pre-primary level more quickly and possibly also at the secondary level.

Introduction

9. Mozambique is one of the poorest countries in the world according to the World Bank (2015b), and is ranked 178th out of 187 countries on the UNDP's Human Development Index. Key elements of the index focus on education: the population's mean years of schooling and currently expected years of schooling; the other elements are life expectancy and gross national income (UNDP, undated). Mozambique has a severe education challenge with a population having on average just 3.2 years of education - a population from which a large workforce of teachers must be drawn.
10. Learning assessments of pupils and teachers in Mozambique illustrate that the education situation is dire, with pupils and teachers alike struggling - and failing - with primary grade 4 level material (World Bank, 2015a). In some other contexts with low learning outcomes in government schools, there has been movement towards the private sector, with this trend becoming more and more firmly established¹. There is interest therefore in discovering what role, if any, the non-state sector (which includes private schools and all other forms of non-government provision) is playing in Mozambique. As non-state involvement in education is generally found more in urban than rural areas, Maputo is the starting point for research in the country. Experience from other countries indicates that whatever the pattern of non-state involvement in the country's main city or major cities, smaller cities and rural areas will have no more (and likely less) non-state engagement in education.

¹ For a comprehensive overview of the research findings, see DFID's rigorous literature review, *The Role and Impact of Private Schools in Developing Countries*, Day Ashley et al., 2014.

11. Maputo is the logical entry point to exploring non-state provision (NSP) in education in Mozambique. The city is a context of great inequality, with a Gini index score of .51; inequality in the education sphere this is evidenced by the presence of many elite private schools for wealthy and expatriot communities, while government schools provide no early learning for young children and operate with many shifts to meet the enormous demand. This study focuses on finding out what kind of NSP is operating in low-income areas of the city, to find out if the phenomenon of 'low-fee private schooling' that is found in Lagos (Härmä, 2013) and Nairobi (Ngware et al., 2013) or some other forms of NSP might be thriving in the context.
12. Searching the entirety of two low-income areas of Maputo, one somewhat less poor than the other, very little engagement was found at the primary level, for which most people avail themselves of the fee-free government system. The greatest level of involvement is at the pre-primary level where there is no government provision, and the second-greatest at the secondary level where relatively low fees are charged at government schools but there is inadequate quantity and quality of provision. There is also considerable 'community school' presence, operating on a model somewhat similar to 'private aided' schools in other contexts, with non-state ownership and management, but staffed with government teachers².
13. This study finds that there is little avenue for investment to drive greater private sector participation, except at the pre-primary level where all provision is non-state. At the pre-primary level the main barrier to access (and likely to more growth of a market of private provision) is the fee barrier; the costs found in this research put it well out of reach of most people. The pre-primary level (and possibly the secondary level) appear to be areas where public-private partnerships could be appropriate to expand access to vital early learning opportunities as quickly as possible, to help meet target 2 of Sustainable Development Goal 4.
14. The structure of the report is as follows:
 - Section two (after this introduction) illustrates the context in which the study was carried out.
 - The third second section outlines the methodology used, and how the study areas were selected.
 - The fourth section presents the survey findings starting with basic characteristics and enrolments of schools, and outlines school facilities. Teachers are discussed in detail.
 - The fifth section presents the findings on school development needs and competition, including proprietors' accounting methods, competition for clientele, and finally the complete costs of accessing private schools.
 - The final section draws some conclusions.
 - The annex provides some tables not included in the main text.

² This form of provision is often treated as distinct from the private sector, as the main cost of running the school, the teacher salary bill, is paid by the government and teachers are civil servants (as in Day Ashley et al., 2014).

The Mozambican context

15. The Mozambican context is characterised by considerable poverty, with 82% of the population living below the international \$2 per day poverty line. The country's population is relatively small and largely rural, with approximately 25.8 million, 69% of whom live in rural locations. The population is quite young, with 45% of people aged 14 years or less (UIS, 2014), and (as noted above) has a very low average educational attainment, at just 3.25 years of schooling (UNDP, 2014).
16. The education challenge facing the country is enormous. While most children will enter school, the vast majority will also drop out without finishing the primary cycle: only 32% of children reach the final year, primary grade 7. The gross intake rate in this last year of primary is just 49%, down from the gross intake into primary 1 of 158% (UIS, 2014).
17. Many children are entering school overage, and classes are also extremely over-crowded; the pupil-teacher ratio in grade 1 is 60:1, and schools operate several shifts (INE, 2013c). Combined with the poor quality of education, these factors are likely to have resulted in most children leaving primary school at some point along the way (UIS, 2014; Lewin, 2007). In addition, most children are entering primary grade 1 with no prior schooling/early childhood education (96% of all Mozambican under-fives) (Ministry of Education, 2014, p.4).
18. A recent World Bank study provides evidence of the extremely low quality of education in Mozambique, noting that while the country is on the brink of meeting the MDG and Education for All goals of universal primary school enrolment, the practical impact of this achievement is limited by very low levels of learning. The World Bank study tested teachers and pupils in primary class 4, and found that the average teacher score across tests of Portuguese, mathematics and pedagogy was just 29%. Pupils fared even worse, scoring on average 24% across Portuguese, mathematics and non-verbal reasoning tests (World Bank, 2015a, p.1). It appears then that little has changed from previous years, with SACMEQ learning assessment results from 2007 finding that only 28% of children had learned the basics in reading, and only 24% in mathematics (SACMEQ III cited in World Inequality Database on Education).
19. Low learning is the result of poor teacher knowledge and also rampant absenteeism: 45% of teachers and 56% of pupils were found to be absent during unannounced visits (World Bank, 2015, p.1). In addition, 16% of teachers were at school but not teaching. A minority of 39% of teachers were actually found in class and teaching (World Bank, 2015a, p.2).
20. Poverty proves a major obstacle, with many children not eating breakfast before school (ibid.; Paulo et al., 2011); these children were found to score 10 percentage points lower than children who had eaten (World Bank, 2015a, p.1). Poverty is also an obstacle to children being prepared to enter school at primary grade 1; there is essentially no government provision of pre-primary schooling, and only the seven years of the primary school cycle are provided fee-free. For this reason many children's education begins and ends with primary school.

21. There is little data on the extent of access to early learning opportunities, and the National Institute for Statistics does not even mention pre-primary education (INE, 2013a, b & c); older survey evidence shows that in 2008 in Maputo city 16% of children aged 3-4 years were in some early learning programme; nationally 2% of the poorest and 13% of the richest children received such opportunities (UNICEF, 2008). As noted above, it is estimated that nationally only 4% of children receive any pre-primary education. The need for pre-primary education and forms of child care for very young children is considerable; in the most recent MICS survey, 33% of children were left without adequate supervision and care (UNICEF, 2008).
22. The government has recognised this need with the 2010-2014 Five Year Plan and Presidential Decree no. 7/2010 highlighting the need to prepare a holistic strategy for pre-primary education. Responsibility for preparing the guidance for the eventual provision of pre-primary education was given to the Ministries of Education, Health and Social Welfare. The National and Holistic Strategy for the Development of Children of Pre-school Age (DICIPE) was prepared in 2011, and the Ministry of Education, through the National Directorate of Primary Education has conducted pilot implementation of the DICIPE in five provinces in the country. There are currently moves to implement this community-based model in Maputo also, with support from the World Bank and UKAid (Ministry of Education, 2014, p.5).
23. Secondary education consists of three years, grades 8 through 10, and families must pay enrolment, tuition and boarding (where relevant) fees, though poor families are meant to benefit from reduced fee levels (UNESCO IBE,2010). Nationally there are too few secondary schools, meaning excessively large catchment areas; combined with the fees involved, only 61% make the transition to secondary school, of the third of pupils who reach grade 7. The NER in 2013 was 18%, and in 2011 only 11% of youths aged 15-24 years had completed their secondary education (DHS, 2011).

The Maputo context

24. The national picture of poverty and educational outcomes is bleak, while that of Maputo is somewhat better. The city has historically been divided between the *cidade de cimento* and the *cidade de canico*, or the formal, well-developed city and the unplanned peripheral *bairros*, or neighbourhoods, with the poorest living conditions found in the latter (Bertelsen et al., 2014). Urban poverty exists in tense, sometimes dangerous, and densely populated areas with slum characteristics such as unregulated growth, lack of common infrastructure for water, electricity, roads, and more, and homes made precariously of unsuitable and impermanent materials (Paulo et al., 2011; Bertelsen et al., 2014).
25. Some things are improving: in Maputo the National Household Survey of 2008/09 has shown a drop in the poverty rate from 54% in 2002/03, to 37% (INE, 2010; MPD, 2010 cited in Paulo et al., 2011, p.15). This is reflected through increasing ownership of consumer durables and increased access to health, education and water (ibid.). Child mortality is at 108 children per 1000, while it is a significantly higher 147 for the country as a whole (ibid., p.17). In Maputo the net enrolment rate at the primary level has reached 96% with very little in the way of

gender gap, while the national NER is 86%. The primary completion rate is 93% as compared with 77% nationally (ibid., p.17).

26. Access to secondary schooling has been expanding somewhat with private schools being established, while expansion of government provision has failed to keep pace. However private schools are unaffordable to the poor, commonly costing between 3,100-4,400 Meticaís per year³, compared with 300 at public schools (Paulo et al., p.38). The private schools follow the national curriculum and are considered to provide fairly good quality education. Some private schools have very many more girls than boys, and this gender imbalance is reflected in wider tensions in society. The gender imbalance may be the result of serious frustration amongst young men who have completed their secondary education and find themselves in the same position of unemployment and dependence as their peers who did not invest the time and money in education. Disillusionment regarding the benefits of secondary schooling may be leading more young men to drop out in search of earning opportunities (Paulo et al., 2011).
27. While certain indicators of socioeconomic well-being have been improving, there remain serious tensions in society with great sensitivity to prices for basic commodities. There have been violent popular uprisings in 2008 and 2010 due to changes in prices for petrol, public transportation, food, water and energy - these were met with policies to address these issues, subsidising the costs to ordinary people (Paulo et al., 2011). Those in poverty have extremely small disposable incomes: table 1 shows that the poorest 20% have only 8.8% of their income to dedicate to health, education and any other family needs. This has clear implications for the poor's ability to access early childhood care and learning opportunities for their young children, and secondary education for older children.

Table 1. Percentage of household expenditure per item by wealth in Maputo

Ownership	Food	Housing	Transport	Furniture	Other
Maputo City	23.4	36.6	7.4	11.2	21.3
Richest quintile	17.8	37.6	8.3	12.6	23.6
Poorest quintile	47.9	32.1	4.7	6.4	8.8

Source: MPD (2010) cited in Paulo et al. (2011).

28. There is very limited information on earnings in Maputo to contextualise the school costs and teacher salaries as outlined in the report below. However table 2 reports information on per capita income in Maputo for 2009. More current and perhaps more relevant for looking at non-state provision in low income areas characterised by high levels of informality, one qualitative study provides data on the earnings of women in the informal market trading sector in Maputo in relation to earnings in the formal sector. It is stated that while low, 3,000 Meticaís per month is a common salary for a low-income employed person, but that 6,000 Meticaís would be considered 'respectable' for a maid or a guard. Using the detailed accounts

³ In January 2016, US\$1 was equal to 45 Mozambican Meticaís. GBP£1 was equal to 68 Mozambican Meticaís.

of incomings and outgoings of a very small sample of market traders, the authors find that 3,000 Meticaís can be earned from selling bread alone, and 5,000 from peanuts, but that very conservatively a trader selling only bread and peanuts could earn 4,000-4,500 Meticaís per month. However, traders selling a variety of about five common products could earn between 7,000 and 10,000 Meticaís, which is comparable to a low, though respectable salary for a full-time employee in the formal sector (Pedersen and Havemann, 2013). While this is the most up-to-date information available on such informal earnings, recent increases in the prices of basic foodstuffs, electricity and water, combined with a substantial drop in the value of the Metical, may mean that these figures are already out of date.

Table 2. Monthly per capita income and expenditure in 2008/09

Maputo City	Income	Expenditure
Mean	1,410	2,175
Richest quintile	4,315	4,396
Poorest quintile	388	417

Source: MPD (2010) cited in Paulo et al. (2013, p.16).

29. In terms of what is known about the extent of private schooling to date, the National Institute of Statistics states that 2% of the country's primary schools are private, while at secondary level it is 28% (INE,2013c, pp. 19-20). As government does not provide at the pre-primary level, by far the largest share of private provision is at this level with virtually 100% of schools being non-state. A recent market study on the non-state sector for Opportunity International (Reichel and Chiulele, 2013) finds a relatively thriving market for private pre-primary schools, highlighting that there appears to be growing demand. It found similar types of secondary schools to those found in this study, and at both levels the report details similar extents of variation in quality of facilities and apparent care and expertise on the part of school directors. The report does not mention any private primary schools, an indication that hardly any existed, similarly to what was found in the present study.

30. The World Bank has examined and documented the current policy environment for private schools in Mozambique, 'benchmarking' against certain criteria the extent to which private schools operate in a conducive environment (World Bank, 2014). In terms of autonomy in decision making fully private schools are allowed a large degree of freedom: while some norms such as curriculum and minimum teaching qualifications are set by government, schools can hire and fire and decide their own salary levels. All other management decisions are also up to the schools. However government-supported 'community schools' have much less freedom. For example appointment of teachers is done by provincial and district-level government officials.

31. In terms of holding schools to account, including the learning levels that children should be achieving by specified stages, there is no difference between fully private and community schools. Children must take the same examinations; schools are inspected by the same authorities, and schools are expected to put in place school improvement plans. Information is

provided on school examination results and parents and community members are meant to be included in school inspection processes. Where government-supported community schools are concerned, there is no selectivity allowed so school choice between government and community schools is restricted only by availability of places. In terms of promoting diversity of supply there is little to stop a provider from entering the market although there are some regulatory requirements, as in most other contexts (World Bank, 2014).

32. Overall the policy environment (which means just that, with no guarantee that all policies are effectively put into practice) was judged by the World Bank to be quite promising for fully private schools, but much more restrictive for community schools. Their report provides suggestions for various ways that the government might take forward policies to put them into practice, and also ways to improve policies themselves (World Bank, 2014).

Methodology for this study

Private schools and how they are reported in this study

33. The aim of this research was to find all schools that exist in the chosen geographical areas, and to document their key characteristics in some detail, meaning that the study is a census survey (as opposed to the more usual sample survey) of two case study areas. It was anticipated that this would be possible due to the expectation that a relatively small number of schools would be found.
34. All schools not owned and managed by the government, and that teach the formal, standard curriculum at any level and for any combination of levels, between pre-primary and *preuniversitario* (grade 12) were covered in the census survey. Researchers were trained to include all schools irrespective of socio-economic level, size, infrastructure and facilities, registration status or staffing (numbers and qualifications). Researchers were trained to capture *all existing schools* by asking local residents and business people where schools are, using a variety of different terms rather than just 'private school'.
35. Child care centres providing crèche (day care) services only, were not intended to be included in the study. However where schools with pre-primary upwards also had crèche, information was also gathered regarding this level and is presented in the tables below. In practice, because pre-primary education is a relatively new concept in Mozambique, it required considerable explanation to make clear the distinction between crèche and pre-primary education. In addition, no private (supplemental) tutoring centres and 'cramming' centres were found during the research, so none are included in the data collection.
36. It is known anecdotally that families - most likely using both government and non-state schools - spend a considerable amount on *explicações*, which means private supplemental tutoring outside of school. In Maputo it is known that this takes the form of teachers or other educated people, often relatively young people, who offer private tutoring in their home or more usually in the home of the pupil. Often several pupils will gather together to receive this tutoring in small groups. It is clear that this represents a significant cost to households, and

this phenomenon requires further investigation through a household survey in order to understand its contribution and how much cost it adds to the private schooling costs captured in this study. This school-based survey was not able to capture information on this aspect of education as this tutoring takes place in private homes at hours convenient to the parties involved rather than in a school setting. Purely Qur’anic or Bible schools teaching only religion were not included.

Selection of case study areas for census survey

37. The two study areas selected were the districts Nhlamankulu, covering 8 square kilometres and KaMaxakeni, with 12 square kilometres. Table 3 provides a picture of the level of development of these districts, and what percentage of households possess certain assets. The districts have poorer socioeconomic indicators than the average for the province, and Nhlamankulu tends to have somewhat poorer indicators than KaMaxakeni; it was the intention of DFID that a very poor and somewhat less-poor area should be chosen. While detailed information on household income by district and Bairro are unavailable, table 3 provides an indication of the poor conditions in the districts.

Table 3. Selected indicators of standard of living and socioeconomic status in study districts - % of households possessing each characteristic/asset

	Nhlamankulu	KaMaxakeni
Walls - cement block	67	84
Walls - zinc	19	5
Walls - bamboo, etc	8	7
Roof - concrete	12	2
Roof - zinc	83	93
Floor - cement	84	92
Toilet - flush	29	19
Toilet - latrine	70	80
Toilet - none	1	1
Electricity	54	67
Water - piped from mains	15	4
Radio	67	69
TV	59	63
Car	10	8
Motorbike	1	1
Bicycle	5	5

Source: INE (2013a & b).

The methodology

38. DFID contracted an international specialist on the issue of private education in developing countries as lead consultant, designing the study, taking part in fieldwork, and analysing and writing up the findings in the present report. A highly experienced local fieldwork manager and researcher-trainer was hired locally. The fieldwork manager assembled the team of experienced researchers, translated the survey instrument and other documents, conducted the training (as this needed to be in Portuguese, however the lead consultant supported and supplemented the training), suggested the study areas to be investigated, and oversaw the fieldwork and later data entry, delivering the dataset to DFID and the lead consultant. Mr Reves had as part of his team a coordinator who was responsible for seeking all of the necessary consents from the local authorities for conducting the research. The lead consultant designed the survey instruments and the approach to the study, participated in the training, and in the fieldwork, providing support, clarification and pointers to the researchers.
39. Training was carried out over two days, followed by a morning pilot of the instrument and an afternoon meeting to discuss what did and did not work well. Changes were made to the questionnaire to reflect the findings of the pilot, and were printed over night. The survey was able to start on the fourth day of the work, on 7th October 2015. Researchers were given defined geographical areas to cover and in the first days of the work were sent out in pairs, until they were confident and experienced enough to cover areas alone.
40. All schools were listed as they were found, using a template form detailing basic information such as school name, address, and levels covered. The aim was to also conduct the survey in all schools meeting the very broad inclusion criteria. In most cases this was possible at the time of finding and listing the school, while in some cases the researcher had to take an appointment to return if the proprietor was not available. The questionnaire was administered in a conversational way, including a combination of closed and open-ended questions.
41. Questionnaires were checked for errors and completeness by the fieldwork manager, and then passed to a specialist database designer for data entry. The finalised datasets were received in three formats, CSPPro, SPSS and Excel. The data was analysed and written up in the present report by the lead consultant, using only descriptive methods as the sample size is very small, with 53 total schools found.

The survey findings

Schools and their basic characteristics and facilities

42. This section outlines some basic characteristics of Maputo's non-state schools. Fifty-three schools serving 13,119 pupils were found; in the study areas 108 total schools were found, 55 of which were government schools of various levels (primary through *preuniversitario*)⁴. The

⁴ Government schools were not surveyed, therefore enrolment figures are not provided but it is suspected that, particularly at the primary level, these schools will be much larger on average.

53 private schools have an average enrolment of 257 pupils, of which 53% are female⁵ (table 4). Of note, there are more girls than boys and every level except for primary level, and in some secondary schools there were found to be very many more girls than boys enrolled⁶. Part of this imbalance is explained by the population being 51.3% female (INE, 2013a & b, p.11).

43. No evidence was found of any 'mushrooming' of small, unregistered private schools, which is one hallmark of an expanding and unregulated private school market. No unregistered schools were found that are not in the process of applying for registration; in the case of primary and upwards, registration is with the Provincial Directorate of Education, while for pre-primary schools it is the Provincial Directorate of Women and Social Affairs. It was found that even in fairly poorly developed neighbourhoods, very few schools reported not having been inspected in 2015 (a few had been inspected in 2014 or 2013), and in the case of pre-primary schools, 2 out of 6 schools currently applying for registration have already been inspected this year. Only one (pre-primary) school out of 53 reported never having been inspected.

Table 4. Selected school characteristics by level served

Characteristic	Pre-primary	Primary	Secondary	Preuniversitario
Schools serving this level	38	11	9	7
Lowest enrolment	9	25	162	16
Highest enrolment	150	1,616	1,782	180
Average enrolment	61	402	747	229
Average per year group	n/a*	57	249	115
% female enrolment	50.3	48.6	58.4	53.1
Total children enrolled	2,263	4,023	5,231	1,602
Number schools registered	32	11	8	6
Applying for registration	6	0	1	1
Unregistered, not applying	0	0	0	0
Inspected in 2015	34	10	8	5
Never inspected	1	0	0	0
Mean year of establishment	2001	1995	2001	2004
No. established after 2010	10	2	1	1

*Year group separations are not as clear at this level as for other levels

NOTE: This table includes all school levels/sections as discreet units while many of these units are contained within one school. Therefore the numbers in the rows do not add up to the 53 total schools found. Some individual schools serve one level, while some serve many - see table 5 below for the make-up of each of the 53 schools.

⁵ However the total enrolment is for only 51 schools as two schools failed to provide enrolment information. The average is calculated on basis of 51 schools providing data.

⁶ As extreme gender imbalance in favour of girls in private secondary schools was also found by Paulo et al. (2011).

44. Table 4 shows that while secondary schools are few, they serve a large role (relatively when compared to other levels of education) in the educational space. NSPs also play a relatively large role at the upper secondary level, from the fewest locations of any level served. As compared to other contexts in which NSP has been researched, the primary level has negligible coverage with relatively few parents opting out of the fee-free government system. While the number of pupils served appears large, it must be remembered that this school level includes 7 school years, while pre-primary includes only 1-2 years (plus crèche), secondary serves only 3 years, and *preuniversitario* serves only 2 years. This means that year-for-year, private primary schools serve the smallest role (see the 'average per year group' in table 4 below). Pre-primary schools have the largest number of separate schools serving any level most likely due to parents' desire to keep small children closer to home, meaning that demand is more localised at this level, leading to a larger number of smaller schools.
45. Nearly 40% of schools are owned by individuals, however 19 of the 21 schools concerned are concentrated at the pre-primary level, where there is no government provision, opening a clear market opportunity. Over half (53%) of schools are owned by religious organisations (9 schools, mostly at the pre-primary and primary levels), and the community (19 schools, 10 of which serve pre-primary, with the rest spread across levels). Removing pre-primary schools from the equation, nearly 77% of schools (serving primary, secondary or *preuniversitario*) are owned by religious or community groups, and only two are owned by private individuals. Fifty of the schools are reported to be regular schools providing the national curriculum, with only one stating that it is a Christian school (but also providing the national curriculum), one is a technical/vocational school, and one was a non-governmental association providing pre-primary education.
46. In terms of school financing, 87% are reliant on user-fees, 2% on community contributions, and the balance are government funded (in the form of teachers being provided by government which represents the bulk of school expenditure). Ten schools charge school fees as a supplemental source of funding (where teachers are paid by the government); one school receives funding from the religious mission on top of their user fees, and one school with a majority of user-fee funded teachers also received a small number of government-provided teachers.
47. Fifteen schools are members of associations. All 15 are members of different types of associations (see appendix), meaning that it appears there is no single dominant group acting in the interests of NSP proprietors. Seven proprietors stated that association membership helps with training of teachers, seven reported that they receive important information and help with various issues when necessary, one cited facilitation of interaction with the government, while two reported receiving no benefits from membership.
48. One of several factors distinguishing pre-primary schools is that there has been much more recent growth than at other levels. While the mean year of establishment is nearly the same across levels (except for primary), 10 out of 38 pre-primary schools have opened after 2010, 5 of these in 2015 alone, the only discernable spike in NSP supply. Non-state primary schools have a much longer history and slower growth than at the secondary levels (which only

appeared from the mid-1990s), with the first non-state primary school opened in 1975, and the rest established relatively evenly across the years. The last two schools were established in 2012; there is no evidence of sharply increasing supply or demand at this level, and many respondents during the survey expressed the view that 'everyone uses the government primary schools because they are free'. Table 5 details the different combinations of levels provided by different schools along with their ownership types.

Table 5. Distribution of distinct schools by levels offered at each school and proprietor type

Owner Type	Pre-primary only	Primary only	Pre-primary & Primary	Primary & Secondary	Primary, Secondary & Upper Secondary	Secondary only	Secondary & Upper Secondary	Upper Secondary only	Total number of schools
Individual	19	0	1	0	0	0	1	0	21
Religious	5	2	0	0	0	1	1	0	9
Community	10	3	0	1	3	1	1	0	19
Company	0	0	0	0	0	0	0	1	1
Other	2	0	1	0	0	0	0	0	3
TOTAL	36	5	2	1	3	2	3	1	53

49. Table 6 below presents ownership information not by distinct schools (serving one or a combination of levels, as in table 5), but by the level served. This table shows more clearly that at the pre-primary level individual school ownership is the most common, while at all other levels community schools are predominant, followed by religious groups.

Table 6. School ownership types, by level

Ownership	Pre-primary	Primary	Secondary	Preuniversitario
Individual	20	1	1	1
Community	10	7	6	1
Religious organisation	5	2	2	4
Private company	0	0	0	1
Other	3	1	0	0
Total	38	11	9	7

50. The extent of physical facilities varies greatly; nine pre-primary schools reporting having just one or two rooms. Eleven report having three rooms, and twelve have four or five rooms. Four schools had eight or more rooms. Three reported having a library; 31 were reported to have sufficient furniture for young children. Of the 38 pre-primary schools, 28 were in owned premises, while seven were in rented accommodation and two were in space granted for free (such as from a religious mission/church).

51. Researchers discretely recorded their observations of the condition of the school premises, finding that 84% of schools had safe, suitable premises; 8% were in acceptable but not optimal premises, while another 8% were in totally unsuitable premises, with 2 schools' locations deemed dangerous to children; six schools hold classes outside due to insufficient all-weather rooms. Only 49% were accessible to children with disabilities. In terms of construction nearly two thirds were in solid purpose-built buildings roughly up to standards and 14% were in converted but suitable, solid buildings. The rest of the schools were in different types of buildings not ideally suited to school use, but all schools were deemed to be making efforts to keep the premises as clean and hygienic as possible. In 89% of pre-primary classes the teachers were found to be working with their classes, with 8% having the majority of teachers found in-class, while 1 school (3%) had very little teaching activity going on when researchers entered the school.
52. With regard to primary level and above, no school was found operating in an unsuitable building, with just under half having some aspect of its environment that is not ideal, however in light of the neighbourhood realities in which these schools function, these findings are positive. Nearly all were in purpose built buildings roughly meeting standards, while the rest were in converted buildings but were suitable for school use, though around one quarter were inaccessible to children with disabilities. School buildings were well-maintained or semi well-maintained and kept clean except in the case of one secondary school which was deemed to be in an unacceptably dirty and unhygienic condition. In this one school also, few teachers were observed to be present and in their classrooms working, while in all other schools all or the majority of teachers were working.
53. In terms of basic facilities all schools from primary to upper secondary had a water source, usually mains-piped water, and toilets, including ones specifically for girls. All schools had sufficient classroom furniture to accommodate students. However secondary schools were severely lacking in some necessary facilities: five out of seven upper-secondary schools have no laboratory, four had no library, and six had no computers. At the secondary level, two out of seven schools with data have laboratories, three had libraries and one had computers. Three primary schools had libraries and three had computers. None had any laboratory facilities.

Teachers

54. Teaching in the study schools that do not receive government support is not lucrative employment. Yet as far as proprietors or principals could tell, only a handful of teachers have other forms of employment outside of the school, and 47 proprietors out of 53 stated that teachers are not allowed to charge their students for extra lessons/tuition outside of regular school hours. However teachers may still supplement their earnings through providing private tuition to other children. The mean salary for a private sector teacher of 'average' experience is 3,812 Meticaï or US\$76 per month (table 5), which compares unfavourably with a market trader selling only bread and peanuts, as documented by Pedersen and Havemann (2013).

Table 7. Teacher salaries per month by level and by teacher sector

Monthly salary	Private sector teachers*	Civil service teachers
Lowest	1,403	6,000
Highest	14,025	24,600
Inexperienced teacher (mean)	3,241	6,500
Average teacher (mean)	3,812	11,166
Experienced teacher (mean)	5,681	20,300

*Numbers of observations: Crèche: 24; Pre-primary: 37; inexperienced teachers: 35; average teachers: 36; experienced teachers: 38. Private sector teachers indicates that these are teachers who are paid out of fee income paid by parents.

Note: This salary information was reported by proprietors in this study. They provided the monthly salary and the number of months per year that this is paid. The yearly salary was then calculated and divided by 12 to arrive at the monthly salary reported here. The average number of months that teachers are paid for is 11.22 months per year.

55. Table 7 separates out the salaries of private sector teachers, which is taken to mean those teachers who are paid out of school fee income, from the salaries of the civil service teachers who work at some of the sample schools. The table shows that the salaries of private sector teachers are extremely low in comparison with civil service pay levels. Six schools have government (civil service) teachers, five of these having only government teachers. Two of the five schools serve primary only; two serve secondary only, and one serves primary and secondary. The sixth school has five teachers that are government-provided but 30 that are paid by the school. Across the five schools with only civil service teachers, the mean salary for a teacher of average experience is 11,166 Meticaï, or nearly three times that of a private sector teacher.
56. The educational levels that teachers have attained are in theory extremely important to their ability to provide good quality education, although it is recognised that often qualifications on paper do not reflect actual subject content and pedagogical knowledge. For this study teachers' highest academic qualifications and teaching qualifications are the only proxies available for teaching quality. While teachers should have a good general education, it is also required (by regulation) that teachers be qualified in teaching. Table 8 provides the numbers of teachers teaching each level, with their qualifications, while table 9 presents teachers' teaching qualifications. Most teachers teach only one level, though some teachers/care-givers were responsible for both crèche and pre-primary, and a few teachers teach both secondary and *preuniversitario* levels.
57. It is clear that most pre-primary teachers are vastly under-educated and unqualified for the work that they do, with a fifth having just primary education and another 43% just up to grade 10, and over a third have no teaching qualification at all. In keeping with the relatively well-regulated non-state sector in Maputo, there are few untrained teachers teaching in the sector: 5% at the *preuniversitario* level and 7% and primary and secondary levels respectively. As

expected, education and qualification levels tend to increase with the level taught, with *preuniversitario* teachers the most highly qualified.

Table 8. Distribution of teachers by general education level and schooling level taught

General education level	Pre-primary	Primary	Secondary	Preuniversitario
Up to primary 7	30 (20%)	2 (2%)	0	0
Up to Secondary 10	64 (43%)	3 (3%)	3 (2%)	0
Up to Preuniversitario 12	54 (37%)	44 (43%)	23 (15%)	5 (5%)
Studying for Bachelors		22 (21%)	13 (9%)	11 (10%)
Degree completed		11 (11%)	56 (37%)	62 (59%)
Masters or higher degree completed		0	2 (1%)	0
Basic Education Certificate Certificado de Ensino (básico)*		11 (11%)	2 (1%)	0
Higher certificate in teaching (Curso de Ensino Superior, UP/UCM)*		10 (10%)	48 (31%)	22 (21%)
Other			6 (4%)	5 (5%)
Total	148	103	153	105

*These teachers have teaching qualifications as their highest education level attained.

Table 9. Numbers of teachers by teaching qualification and schooling level taught

Teaching qualification	Pre-primary	Primary	Secondary	Preuniversitario
None	52 (35%)	7 (7%)	11 (7%)	5 (5%)
MagisterioPrimaria	15 (10%)	4 (4%)	1 (1%)	0
UEM/CFP 10 ^o /11 ^a	0	0	1 (1%)	4 (4%)
CFPP 6 ^a /7 ^a + 3 anos	0	2 (2%)	0	0
Instituto do Magistério Primário (IMP)	0	0	9 (6%)	0
10th grade + 1 year training	12 (8%)	15 (15%)	0	1 (1%)
12th grade + 1 year training	7 (5%)	21 (20%)	14 (9%)	5 (4%)
EducadorInfantil	6 (4%)	0	0	0
Instituto do MagisterioPrimario	4 (3%)	26 (25%)	0	0
Bacharelato / Licenciatura (UP/UCM)	1 (1%)	27 (26%)	104 (68%)	65 (62%)
No response	51 (34%)	0	0	0
Other	0	1 (1%)	12 (8%)	25 (24%)
Total	148	103	153	105

58. Irrespective of qualifications already gained, teachers benefit from further professional development in the form of in-service training. Proprietors were asked whether they provide any training for their teachers, and if so, what type. The most common is for the proprietor or

an experienced member of staff to instruct teachers in the basics; of note, at the pre-primary level proprietors report sending their staff on external training courses and also hiring in consultants/trainers to come and provide training. It should be noted that the survey collected no evidence as to the effectiveness or usefulness of this training.

Table 10. Numbers of proprietors reporting providing different types of training, by level

Type of in-service training	Pre-primary	Primary	Secondary	Preuniversitario
Basic instruction from proprietor or other member of staff	16	3	3	4
Seminars for all teachers as a group, from a proprietor or other member of staff	2	3	3	2
Training seminars by external trainer/consultant	7	2	2	1
Teachers sent on external training course	8	0	0	0
No training is provided at the school	7	3	2	1

59. With regard to how classes and classrooms are arranged, the two schools in the sample that serve both primary and pre-primary levels use multigrade teaching in grouping together primary 1 with the pre-primary class. And with regard to all of the 38 schools serving the pre-primary level, 29 schools provide dedicated teachers for each pre-primary class at all times, but 9 schools stated that this is not the case. In addition, 13 schools stated that there is no separate, age-appropriate curriculum for pre-primary levels that is distinct from primary school material. More generally, 45 proprietors stated that their schools are strictly monograde, while the other 8 employ different multigrade teaching arrangements.
60. Pupil-teacher ratios differ drastically by level. At the pre-primary level it is the lowest at just 12 children per teacher, and it is highest at the primary level with 39 pupils per teacher. At secondary level there is a relatively high 34 pupils per teacher, but only 15 at the *preuniversitario* level.
61. Proprietors report some problems with their staff, however complaints were few. Twenty-seven proprietors said that they had no problems with their staff; 9 reported that teachers complain about low pay or difficulty in receiving their salaries. Most commonly, 11 proprietors reported that teachers are not punctual but only 7 reported that absenteeism is a problem. Very few other complaints were expressed regarding teacher performance, such as planning lessons. Conversely, 33 proprietors reported that their teachers are dedicated and hard-working. Thirteen reported that teachers are highly competent, while 24 reported that they are kind and caring to their students. Fourteen reported that teachers are ready and eager to learn and improve. On balance, the positive reports regarding teachers far outweigh the negative. Lastly, 39 proprietors reported that when it is necessary to find new teachers, it is

not easy to do, which is not surprising given the common educational attainment of the population.

School development needs and market competition

School development needs and accounting

62. Thirty-seven schools reported facing obstacles that impede their ability to improve or expand. Proprietors were then asked what were their three greatest obstacles in order of importance. Analysis was run separately for schools with community and religious organisation ownership and schools with pure private sector ownership, but there was no difference in the types of issues reported. Table 11 indicates the issues reported by proprietors, with access to credit being the single largest issue and knowledge of school management and accounting being also frequently mentioned, as well as difficulties involved in teaching children from poor backgrounds.

Table 11. Challenges faced by school proprietors / managers

Type of challenge	Greatest obstacle	Second greatest obstacle	Third greatest obstacle
Access to loans /credit	10	4	3
Access to suitable land / site to buy	2	3	3
Access to suitable land / site to rent	3	1	4
Lack of tenure on my rented site	2	4	2
My school site floods during rains	1	5	4
Financial management skills / capacity	5	6	9
Cash flow / erratic incoming (fees)	2	6	2
High teacher salaries mean too few teachers for school of this size	2	1	3
Low skill /knowledge of teachers	1	0	5
High operating costs, rent, etc.		2	1
Competition very difficult - many schools in this neighbourhood	3	2	0
Lack of registration status limits my ability to expand / operate openly	0	0	0
Government interference	0	2	0
Background of pupils very low/poor	6	1	1

63. Proprietors were asked about their relationship with government, and very few reported having any problems in this area, with a clear majority reporting that relations with the relevant authorities are cordial.

64. With regard to school accounting, 36 schools have dedicated bank accounts, while 17 have no bank account at all (see the appendix for the list of institutions schools reported using). Only 9 proprietors have got loans for school improvement (5 from microfinance banks and 4 from commercial banks), while 40 reported never even trying to get a loan, and only 3 report having tried to get a bank loan but were rejected. The repayment terms (period of time) of the loans in months range from 2-60 (see appendix); the highest interest rates quoted were 27-30%. Four proprietors reported that the loans were not really appropriate for their needs, due to high interest rates; only 2 proprietors reported being caught in a cycle of revolving, short-term, high-interest loans.
65. In terms of proprietors' accounting methods, 34 reported using proper accounting methods in a specific accounts ledger. Eleven reported simply recording incomings and outgoings as they occur; five recorded only what was owed from parents, and what was owed to teachers in a notebook; one used a computer-based accounting system, and one kept no accounts at all. Thirty-one proprietors maintain a clear separation of school accounts from their own personal accounts; sixteen reported no separation at all, while two reported sometimes dipping into either personal or school accounts to fill gaps in the other, only when necessary.

Table 12. Government taxes and fees - numbers of schools paying each

Type of government fee	Number of schools paying this fee
Registration renewal fee	22
Signage/advertising	1
Fumigation	3
Local tax	4
Mobile advertising (on school bus, etc.)	2
Environment tax	27
Water rates	16
Personal income tax (proprietor)	2

66. Schools reported having to pay fees to the government, but were unable to report how much was paid in each of these fees (table 13). However they were able to report on expenditures on total salaries, utility bills and maintenance. Many proprietors supplied figures on their total outgoings, as well as their intended income (based on set fees and numbers of children enrolled) as well as actual income (taking into account that parents often do not pay the entire amount agreed to). These figures are reported in table 9 below, however it is highly unlikely that the figures are accurate, as actual income exceeds intended income, which is improbable for private schools serving poor and relatively poor communities. It is not uncommon for such data to require extreme caution, as most proprietors will have reported answers based on very rough estimations only.

Table 13. School expenditures/outgoings and income, planned and actual

	Minimum	Maximum	Mean
Total annual outgoings	1,400	2,040,000	483,085
Intended income	1,680	2,800,000	744,094
Actual incomings	1,600	3,000,000	771,395

67. The above estimate of school outgoings is extremely different from the estimate in table 14, which is based on proprietors' reports of their utility bill expenditure, plus their salary spending per year. These calculations were made excluding government-aided schools that have no salary outgoings - indicating once again that the figures are only very roughly reliable, as schools paying salaries could not have as low an annual expenditure or expected income as 1,400-1,680. Key conclusions to be drawn from the data are that these figures can provide an extremely rough approximation only, and that it is extremely difficult to get at the truth of private school finance, and for a truly accurate picture it is most likely necessary to ask proprietors to keep a spending diary over a period of months.

Table 14. School expenditures/outgoings

	Minimum	Maximum	Mean
Utilities, etc	6,000	420,000	64,018
Salaries	38,400	7,027,200	1,198,314
Total	44,400	7,447,200	1,262,332

Competition and the non-state provider clientele

68. When asked whether the school felt under pressure to compete with other schools to attract clients, 26 proprietors stated clearly that they feel this type of competitive pressure, while 24 stated that they do not have any competition due to a dearth of schools in the local area. Most children (72%) come by foot, and most from short distances away, though further than in some contexts characterised by large numbers of private schools. Seventy-five percent of proprietors stated that the average distance that children travel is 1.5 kilometres or less; while another 21% reported 2-3 kilometres.

69. The costs of attending a private school are high, even for those with stable employment. The majority of proprietors stated that the parents of their pupils include civil servants and highly qualified private employees (81%); skilled workers or labourers (21%); domestic workers (43%); and small business owners (25%). Only 13% of proprietors reported that they cater to the children of manual labourers or petty traders (6%) or employees in small or informal businesses (11%). Only 21% of proprietors believe that their clientele includes poor families, while 55% cited the lower-middle classes and 64% cited the established middle classes as

being amongst their clientele. Thirteen percent of proprietors believe that the bulk of their clientele to be poor, while the remainder believe the majority of their clients are middle class (51%) or at least lower-middle class (36%).

70. These schools are not likely to be easily affordable. Only 25% of proprietors reported that parents are regular and reliable at paying school fees; 38% stated that parents are for the most part regular and only sometimes late with paying. Twenty-one percent stated that parents are frequently irregular and need to be chased in order to get full payment; and 9 percent reported them to be extremely difficult to extract payment from. Half of all proprietors reported that sometimes parents will remove their child from the school when it becomes clear that they will not be able to pay the fees, so the school loses out, however this was not cited as a very common occurrence, as it is in Lagos.
71. In cases where payment is not easily forthcoming, 32% of proprietors will accept payment as and when parents can manage, but do expect full payment eventually; 28% accept payment in parts and even accept that parents cannot pay the full sum; and 26% report chasing and chasing parents until they finally pay (in part or in full). Approximately two thirds of schools provide discounts/accept less than the stated fee from parents; mostly based on the individual circumstances of the family (47%), and 38% for children who are partial or total orphans or based on other compassionate grounds, with a few other criteria at small numbers of schools.

Complete costs of attending non-state schools

72. Table 15 sets out the full costs of attending the surveyed non-state schools. Costs increase per level as expected, however it should be noted that many previous studies from other contexts have found that proprietors tend to report the complete costs as being somewhat lower than what parents report. In this case there is no household survey data with which to compare. The final row in the table represents the amount per month, which should be considered in light of reasonable salaries at the low-end of formal (and informal) employment discussed in paragraph 27 above. The costs represent a large proportion of monthly salaries and are well out of reach of those earning between 3,000 and 10,000 Meticaïis per month, i.e. many residents of Maputo. It should also be noted that many of the costs (such as registration, uniforms and books) must be paid up front, which is challenging for poor households.
73. The fee (per annum) for crèche (available in 22 out of 38 pre-primary schools) is 14,523 Meticaïis on average; other costs are similar to those at pre-primary. Twenty-five pre-primary schools also charge a 'graduation fee' of 993 Meticaïis upon transition to primary school. Roughly half of all 53 schools charged registration fees only upon first enrolling at the school; where this was the case, it was on average 1,004 Meticaïis at the pre-primary level; 1,338 at the primary level; 699 at the secondary and *preuniversitario* levels.

Table 15. Complete costs of attending surveyed schools

Fee type	Pre-primary	Primary	Secondary	Preuniversitario
Monthly school fee	12,618	11,800	5,362	9,721
Registration fee (annual)	1,119	487	967	967
Exams	0	363	370	370
Uniform	275	429	387	387
Books	166	1,503	2,122	2,122
Materials	0	583	620	620
Transport	0	0	10,457	10,457
Total per annum	14,178	15,165	20,285	24,644
Total divided by 10 months	1,418	1,517	2,029	2,464

Conclusions

74. This report finds that the 'education market' in Maputo has not developed to the extent that other sub-Saharan African contexts have experienced. On the surface this lack of spontaneous development against the odds (as in other contexts) would seem to indicate that there may be relatively little scope for investment. It is clear from several schools reporting long waiting lists for places that there is high demand for what is perceived to be better quality education than that available at government schools. The identification of affordable models suitable for the urban Mozambican context, combined with a more favourable business environment, could change the scenario.
75. Schools do require financial services such as bank accounts and access to credit, however at the present time there appear to be relatively few potential clients for such services. Many proprietors would benefit from capacity building in terms of school management and accounting. However relatively few schools reported access to credit as being a major barrier to their development, however it is unclear whether this is because they really are not interested in borrowing, or rather because they do not apply for loans as the application process is long, complicated, and unlikely to result in a loan.
76. The numbers of schools has increased at a very slow pace, however if there was support/subsidisation at the demand side, it appears likely that the secondary level could grow, as well as the pre-primary level. It is at the latter level that the market has been developing the most with no support of any kind, however private pre-primary school is extremely expensive and out of reach for many people, and so even here, at a level that government does not provide at all, expansion is relatively limited though appears to be growing.
77. The small extent of access to pre-primary services is of concern for child development, educational outcomes, wider social equity and national development. It may be that

partnering with private providers could prove a more cost-effective way of expanding access at this level. However it is not desirable that unit costs should be as low as they are based on very low pay for very poorly qualified staff. Effective early childhood education and development services require skilled staff, or those with higher educational and professional qualifications than those currently employed in private and other non-state pre-primary schools in Maputo.

78. The non-state sector is providing an invaluable service at the secondary level where there are insufficient numbers of government schools. There is very high demand for private-aided or 'community schools' owned and managed by religious missions as it is reported that management of these schools is more effective than at regular government schools. It appears likely that expansion of these private-aided schools would benefit people through lower-fee access to better-quality secondary school, however with very low participation rates at this level it appears likely that any cost burden will continue to prove an obstacle to access for the poor, as at the pre-primary level.

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Annex

Table 16. Banks used by school proprietors

Bank name	Number of school clients
Barclays	2
BCI	11
BCI/BIM	2
BIM	8
FNB	2
Millennium BIM	1
Nlhuvuco	1
Standard Bank	5
Unsure which bank	4

Table 17. Repayment terms of loans in months

Repayment term in months	Number of schools
2 months	1
6 months	1
8 months	1
14 months	1
48	2
60	1

Table 18. Names of associations of which schools are members

Association name	Number of member schools
Accao Social	2
Ademo	1
Amodec	1
Arquidiocese de Maputo	1
AssociacaoMamas do Chamanculo	1
AssociacaoAcadec	1
Associacao Amandla	1
AssociacaoDambu	1
Associacao de Maxaquene	1
Associacao do Continuadores	1
AssociacaoModet	1
Associacao Se Rixile	1
IrmãsFranciscanas	1
Sociedade do Ensino e Investigacao	1