

Availability of Education for the Mentally Challenged and Disabled In Zambia

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Abstract

This study examines the availability of education for mentally challenged and disabled learners in Zambia, focusing on policy, resources, and access. Using a qualitative approach, data were collected through interviews, document reviews, and observations involving key stakeholders. Findings show that although Zambia has supportive inclusive education policies, implementation remains weak. Limited special schools, inadequate teacher training, insufficient learning materials, and lack of assistive resources restrict effective inclusion. Additionally, socio-economic barriers, urban–rural disparities, and negative societal attitudes further limit access. The study concludes that despite strong policy frameworks, educational provision for learners with disabilities remains inadequate and unequal. It recommends improved policy implementation, increased investment in resources and training, and stronger collaboration among stakeholders to enhance inclusive education.

Keywords: Inclusive Education, Disability, Special Education, Access to Education, Teacher Training, Resource Provision, Zambia.

1. INTRODUCTION

This chapter will give an outline on the background of the study, its statement of the problem, and the general objective and its specific objectives and the research questions. It will look at the significance of the study, theoretical and the conceptual framework.

Background of the Study

Inclusive education is an approach that ensures all learners, regardless of their abilities or disabilities, have equal access to quality education within mainstream schools. Globally, education systems have shifted from segregated special education to inclusive systems that promote participation, equity, and social integration. This shift is supported by international frameworks such as the Salamanca Statement (1994) and Sustainable Development Goal 4, which emphasize inclusive and equitable quality education for all.

In Zambia, inclusive education has been adopted as a key policy direction. The government has introduced policies such as the Inclusive Education Policy and the Disability Act to promote access to education for learners with disabilities. These frameworks highlight the importance of integrating learners with Special Educational Needs and Disabilities (SEND) into mainstream classrooms.

Despite these policy efforts, challenges remain in practice. Many schools lack adequate infrastructure, trained teachers, and learning materials to support learners with mental challenges. In addition, societal attitudes and stigma continue to limit participation and access. As a result, there is often a gap between policy intentions and actual implementation in schools.

This study focuses on examining the availability of education for mentally challenged and disabled learners in Zambia, considering both policy frameworks and practical realities.

Statement of the Problem

Although Zambia has made progress in developing policies that support inclusive education, many learners with mental challenges still face barriers to accessing quality education. Special education schools are limited and unevenly distributed, often concentrated in urban areas.

Mainstream schools, which are expected to implement inclusive education, frequently lack the necessary resources, trained personnel, and support systems. As a result, learners with mental challenges may be enrolled but not adequately supported, leading to poor academic outcomes and limited participation.

This situation highlights a gap between policy and practice, raising concerns about the effectiveness and availability of education for these learner

Purpose of the Study

The purpose of this study is to examine the availability of education for mentally challenged and disabled learners in Zambia and to identify factors affecting access, quality, and participation.

General objective

To examine the results as to why education for the mentally challenged and disabled persons schools are performing in Zambia

Specific Objectives

To assess as to whether schools for the disabled and mentally challenged can perform and see the determinants of their performance and how helpful and profitable to the community and Zambia at large.

Research Questions.

- i What determines the growth of schools for the disabled and mentally challenged excelling in the communities and Zambia at large.
- ii What strategies can we use to analyse ways of benefit to the community in Zambia.
- iii What difficulties are being experienced in the provision of education for the disabled and mentally challenged in our communities and Zambia at large.

Operational definitions of concepts.

School settings: performance: Social factors set up costs: Cultural issues:

This is a type of education that involves people with mental challenges and disabilities putting up schools where they are needed for human development which can be put on commercial bases or for both the government and private sectors.

By this we will see at what extent to which education for the disabled and mentally challenged of such investment is productive.

These factors do encourage investment of putting up schools which by the end of the day we find out that people with mental issues and disabilities are taken care of and their lives are improved. We need to know how much is needed to come up with such an investment

Being equipped with Knowledge and skill: if one is to come up with such which institution can they be referred to for more information and training.

Significance of the Study.

Research on the disabled and mentally challenged is important because it can help dispel myths, advance policies and practices that support their inclusion and well-being, and

enhance knowledge of their needs. These studies can aid in identifying obstacles to involvement, provide guidance for the creation of easily accessible and efficient support services, and advance a society that is more just and equal. After the research has been disseminated, it will help to increase knowledge on teachers handling mentally handicapped learners. They will re-examine the approaches they use in handling challenges of this group of learners with the view of improving them. The society has always considered the mentally handicapped children as an enigma. Some parents with such children have confined them to their little hope of guiding them through their normal lives. The parents of mentally handicapped learners will be able to set achievable goals for their children. They will stop comparing them with normal average learners. They will also use the right approaches and will accept them.

The learners themselves will enjoy learning since the parents will have understood them they will also learn in an environment which is modified and fits them

Justification of the Research

The reasons for such a study are to see how helpful such cadres can be assisted as there has been low levels of participation by the ministry of education in Zambia and specific Livingstone. As this will be of good development to Zambia and its cities.

For such findings it would be helpful to the policy makers and other influential organizations.

Delimitation of the Study

The study did focus on finding exactly what determines education as a business in Zambia which mainly is conducted by the government and a little percentage of it by the private sector throughout the nation of Zambia. This research was undertaken by the researcher who is very much knowledgeable to the area of research.

Theoretical Framework

The highest theoretical equilibrium yield that can be consistently extracted (on average) from a stock under current environmental conditions without substantially impacting the reproduction process is known as the maximum equilibrium yield theory. The Schaefer model and other models of surplus output are used to estimate it (Indicators for Sustainable Development of Marine Capture Fisheries, 1999). It is anticipated that, the mass of a given fish stock will decrease compared to its normal level as the amount of fishing that it is subjected to rises. Consequently, the more fishing done, the less can be harvested with a given amount of labor, other things being equal. The degree of saturation of the range that sustains the fish should decrease as fishing reduces the stock's density. Under simple ideal conditions, if a given modest harvest were to be repeated year after year, the stock should eventually reach a new equilibrium at a mass lower than that of the virgin stock, declining less quickly each time. Therefore, decreased abundance can simply indicate that the resource is being used. There must be a limit, or a degree of decline, to a fish stock's capacity to achieve equilibrium with a fishery. It would be anticipated that, fishing would increase the catch with which the stock could reach the threshold of equilibrium and beyond. To prevent overfishing, pond, tank and cage fish farming should be used for additional continuous effort beyond the critical level of fish stock. One definition of "overfishing" would be an increase in fishing effort that leads to a decrease (in comparison to what would have been attained otherwise) in both the density of stock and the total weight of catch. To preserve fish equilibrium for human consumption and bridge the gap of nation's fish deficit, farmers must be encouraged to raise fish in ponds, tanks and cages. The government can encourage the

growth of fish in ponds, tanks and cages on water bodies to augment native fish if there is a substantial demand for them. Furthermore, when the resource has been depleted beyond its level for maximum equilibrium yield, the price that society would pay for it may increase enough due to scarcity and to discourage the fishing effort to continue. The unguided interaction of social factors can lead to a waste of effort that management could have prevented because the same equilibrium poundage might have been generated with less work prior to the stock being lowered below the critical point. Although it is unlikely that extermination for profit could affect most marine fishes and invertebrates, a commercial fishery could cause extermination if fishing continued to be profitable until the stock is reduced below the level at which it could maintain equilibrium. This is the case for whales and anadromous fishes. Therefore, the results of lowering a stock below the level for maximum equilibrium yield may be clearly defined in terms of wasted effort. Since overfishing is a result of dietary discrimination, it is difficult to prove the societal advantages of management's efforts to save this endeavor. For example, Zambia's capital fisheries, which are the best-documented example of a marine fish stock primarily imported from China, can also feed nutrient-dense fish of other types (like tilapia) raised in the nation's cage and fish ponds to keep fish stock levels in balance. Thus, the high nutritional value attributed to the fish types that allow overfishing seems to be the consequence of a culturally conditioned desire that can only be described as logical in a very narrow sense. These preferences aren't always set in stone.

2. LITERATURE REVIEW

Social Model of Disability

First articulated by Oliver (1990), the social model contends that disability is produced by social, architectural and attitudinal barriers rather than by individual impairments. UNESCO's inclusion agenda builds on this view, challenging education systems to remove environmental and instructional obstacles so that all learners can participate on an equal basis.

Human-Rights Model and CRPD

The 2006 United Nations Convention on the Rights of Persons with Disabilities (CRPD) reframed access to education as a legally-binding right. Article 24 obliges States to ensure an inclusive system at all levels, supported by reasonable accommodation. Zambia ratified the CRPD in 2010 and domesticated it through the Persons with Disabilities Act 2012.

Capability Approach

Sen's capability approach stresses what people are effectively able to "be and do." For learners with intellectual disabilities the question is not only school admission, but whether schooling expands real freedoms such as communication, social participation and employability. Inclusive pedagogies, assistive technology and adapted curricula are therefore integral to capability expansion.

Ecological Systems Theory

Bronfenbrenner's ecological model highlights nested influences—from the classroom microsystem to national policy macrosystems—which interact to shape educational opportunity. Applying this lens allows the present study to analyse how household attitudes, school resources and ministerial budgets converge to affect availability.

Conceptual Framework

Integrating the foregoing theories, the study adopts a multi-level conceptual framework. Structural determinants (laws, budgets, national curricula) interact with institutional determinants

(teacher training, physical accessibility, assistive devices). These are mediated by socio-cultural determinants (stigma, parental expectations) to influence the availability of appropriate, accessible and acceptable education for mentally-challenged learners. The framework anticipates that positive policy intent alone is insufficient without aligned resources and supportive community norms.

Global Landscape

Prevalence and Schooling Gaps

UNICEF's 2021 *Seen, Counted, Included* report estimates that 240 million children—one in ten worldwide—live with a disability and are 49 per cent more likely never to have attended school.

The 2020 Global Education Monitoring (GEM) Report stresses that exclusion is heightened for learners with intellectual disabilities, who face both functional and attitudinal barriers.

International Commitments

The Salamanca Statement (1994), Dakar Framework (2000) and Sustainable Development Goal 4 (2015) collectively commit governments to “inclusive and equitable quality education.” The World Bank's 2025 disability-inclusion target that all education investment projects be disability-inclusive signals growing development-partner scrutiny.

Emerging Good Practice

Evidence from diverse contexts points to five recurring success factors: (i) universal design for learning; (ii) continuous professional development for teachers; (iii) multi-disciplinary support teams; (iv) availability of low-cost assistive technology; and (v) data systems that disaggregate disability. The 2023 GEM technology report cautions, however, that digital interventions must be accessible by design or they risk widening disparities.

Sub-Saharan African Perspective

Sub-Saharan Africa hosts the world's highest out-of-school rate among children with disabilities. UNESCO estimates that over 30 per cent of disabled pupils in the region have never enrolled, with rural girls with intellectual disabilities most affected.

Comparative studies in Kenya, Ghana and South Africa reveal common constraints: inadequate teacher preparation, scarce specialised materials and persistent cultural stigma (Engelbrecht et al., 2016; Polat 2011).

The World Bank's 2024 Inclusive Education Fellows Programme—covering Malawi, Rwanda and Zambia—exemplifies regional efforts to cultivate practitioner leadership for inclusion.

Zambian Context

Policy and Legal Foundations

Zambia's Education Act 2011 recognises special educational needs; the Inclusive Education Implementation Guidelines (2015) operationalise the policy, while the Ministry of Education Strategic Plan 2022-2026 pledges “accessible, inclusive and quality education.”

Yet policy coherence remains fragile, with limited budget tagging for disability. UNICEF's

2024 budget brief shows that only 3.8 per cent of the education budget was earmarked for special education programmes

Infrastructure and Physical Access

The 2023 Education Statistics Bulletin reports that just 9 per cent of government schools have ramps and 12 per cent possess disability-friendly toilets. Rural schools are the least accessible, reflecting broader infrastructural inequities.

Teacher Supply and Preparation

Zambia boasts fewer than 1,500 credentialed special-education teachers for a basic-school population exceeding 4 million, giving a ratio of roughly 1 : 2,700. A 2020 mixed-methods study of two provinces found that teachers felt ill-equipped to adapt lessons for intellectually-disabled pupils and cited lack of in-service training as a major obstacle.

Curriculum Reform and Learning Materials

An analysis of the 2013 and 2023 national curriculum frameworks shows only 38 per cent textual divergence, indicating limited progress toward embedding inclusive content and assessment adaptations.

Furthermore, Braille textbooks and simplified readers remain scarce outside Lusaka and Copperbelt.

Assistive and Digital Technologies

While Zambia launched the UNICEF-backed Learning Passport platform in 2022, connectivity costs and lack of screen-reader compatibility restrict uptake by learners with cognitive or sensory impairments.

Community Attitudes and Stigma

Qualitative work by Nkhosi & Menon (2015) documents persisting beliefs that mental disability is a form of witchcraft or ancestral punishment, discouraging families from enrolling children in school. Parent-teacher associations in Southern Province report social isolation of intellectually-disabled pupils even when admitted.

Programme Interventions

The EU-funded Sightsavers Inclusive Education Programme (2011-2015) piloted classroom assistants and community-sensitisation campaigns, raising enrolment of disabled learners in targeted districts by 27 per cent.

Yet the scheme's external evaluation warned that scale-up requires sustained government financing.

Empirical Studies in Zambia

Zimba (2019) surveyed 120 primary teachers and found that 72 per cent held negative efficacy beliefs regarding teaching mentally-challenged pupils, correlating strongly with class size.

Phiri (2020) demonstrated that schools receiving earmarked inclusive-education grants invested primarily in infrastructure, with minimal allocation to instructional materials.

A 2024 peer-reviewed study on curriculum reform (turn0search9) concluded that alignment between policy rhetoric and classroom practice remains weak; only 22

Contained differentiated activities for learners with intellectual disabilities.

Ngulube et al. (2020) explored secondary-school implementation and identified three systemic blockers:

- (i) absent school-level guidelines
- (ii) inadequate funding, and
- (iii) weak monitoring by district education boards.

Collectively these studies expose a nationwide pattern of policy-practice disjuncture.

Synthesis and Research Gap

The literature affirms that Zambia has embraced inclusive education normatively, yet implementation is hindered by infrastructural deficits, limited trained personnel, constrained budgets and entrenched stigma. Previous studies tend to focus on either primary or secondary levels, seldom offering a holistic availability audit spanning infrastructure, resources and stakeholder perspectives across rural–urban divides. Moreover, intellectually-disabled learners—who often require multi-modal support—remain under-researched relative to those with sensory or physical impairments. No recent mixed-methods study has triangulated policy analysis, facility observations and community narratives to gauge the actual availability of education for mentally-challenged learners. Addressing this gap is the *raison d'être* of the present investigation.

3. RESEARCH METHODOLOGY

Research Design

This study adopts a mixed-methods research design, combining both quantitative and qualitative approaches to gather comprehensive and multidimensional data. The rationale for choosing a mixed-methods design is to ensure a more holistic understanding of the educational realities faced by mentally challenged and disabled individuals in Zambia. While quantitative methods will help measure and quantify the extent of availability of educational services, qualitative methods will provide deeper insight into experiences, attitudes, and contextual challenges. The design is primarily descriptive and exploratory in nature. The descriptive aspect is aimed at documenting existing educational provisions, infrastructure, and personnel for mentally challenged learners. The exploratory aspect is intended to uncover underlying causes for the marginalization or inaccessibility of education among this population, particularly from the perspective of stakeholders such as caregivers, educators, and community leaders.

Research Paradigm

The study is rooted in the interpretivist paradigm for the qualitative component, which emphasizes understanding human experience and behavior within specific contexts. It also incorporates the positivist paradigm for the quantitative component, which is concerned with observable, measurable phenomena. The integration of these paradigms allows the researcher to interpret not just what is happening but also why it is happening.

Study Area

The research will be conducted in four selected districts of Zambia:

- i Lusaka (urban setting)
- ii Ndola (urban setting)
- iii Monze (semi-rural setting)
- iv Mansa (rural setting)

These locations have been selected to reflect diversity in geographic, economic, and institutional contexts. Urban areas such as Lusaka and Ndola offer access to relatively more developed inclusive education policies and infrastructure, whereas Monze and Mansa provide insight into the challenges faced in under-resourced rural districts. The comparison between these areas will offer a balanced view of the national situation.

Target Population

The population for this study comprises all stakeholders involved in the education of mentally challenged and disabled individuals in Zambia. These include:

Officials from the Ministry of Education and Zambia Agency for Persons with Disabilities (ZAPD)

Non-Governmental Organizations (NGOs) involved in special education

The broad range of stakeholders ensures a wide spectrum of perspectives regarding access, availability, challenges, and policy implications.

Sample Size and Sampling Techniques

- i Purposive sampling will be used to select key informants such as teachers trained special education, Ministry of Education officials, and NGO personnel.
- ii Mentally challenged learners (via proxies such as guardians)
- iii Parents and guardians of mentally challenged learners
- iv Teachers (both special education and mainstream)
- v Headteachers and school administrators
- vi 20 school administrators and teachers
- vii 30 parents or guardians of mentally challenged learners
- viii 10 education policy officials and NGO representatives
- ix 40 caregivers and community members from rural and urban settings

Sample Size

The study will involve a total of 100 participants, drawn from the categories outlined above: This sample size balances manageability and representation within the constraints of time and resources.

Sampling Techniques

A combination of purposive, stratified, and snowball sampling methods will be used:

- i Stratified sampling will be used to ensure balanced representation from urban and rural settings, and from different school levels (primary and secondary).
- ii Snowball sampling will be used to locate parents or caregivers of mentally challenged children, especially in rural communities where formal records may be limited.
- iii School enrolment of mentally challenged learners
- iv Availability of special education teachers
- v Physical infrastructure adaptations
- vi Availability of learning materials
- vii Frequency of teacher training in special needs education
- viii Personal experiences of accessing education for mentally challenged learners
- ix Perceptions of the quality and inclusiveness of education

Data Collection Methods

Structured Questionnaires

Structured questionnaires will be administered primarily to school teachers and administrators.

The questionnaires will include both closed and Likert-scale questions, which will be pre-tested for clarity and reliability.

Semi-Structured Interviews

Semi-structured interviews will be conducted with parents, caregivers, and Ministry of Education officials. These interviews will explore.

- Opinions on existing policy implementation Suggested improvements from the community perspective
- Cultural beliefs and social stigma surrounding mental disabilities
- Community support systems or lack thereof
- Suggestions for increasing school attendance among disabled children
- Presence of ramps and disability-access toilets
- Class sizes for special needs learners
- Use of assistive technologies
- Visibility of inclusive education signage and awareness materials

These interviews will be recorded (with consent) and transcribed for thematic analysis.

Focus Group Discussions (FGDs)

FGDs will be conducted with caregivers and community members in each of the selected districts. These discussions will explore:

Each focus group will consist of 6–8 participants and will be guided by a moderator using a preprepared guide.

Direct Observation

An observation checklist will be used to assess the physical environment of selected schools.

Key indicators include:

This observational data will provide an objective measure to complement self-reported responses from interviews and questionnaires

- Transcribing the data
- Familiarizing with the content
- Coding data into recurring patterns
- Identifying major themes
- Relating the themes to research objectives
- Standardizing the data collection process
- Training research assistants on ethical handling of vulnerable populations
- Using multiple data sources to cross-check information

Quantitative Data Analysis

Quantitative data from the questionnaires will be coded and analyzed using Statistical Package for the Social Sciences (SPSS). Descriptive statistics such as frequency distributions, mean scores, standard deviations, and percentages will be used to summarize the data.

Comparative analysis will also be employed to examine differences between urban and rural settings in terms of resource availability and policy implementation.

Qualitative Data Analysis

Qualitative data from interviews and FGDs will be analyzed using thematic analysis. This involves:

Vivo software may be used to manage and visualize qualitative data if resources permit.

Validity and Reliability

To ensure validity, the research instruments will be pre-tested in non-sampled schools. Revisions will be made to improve question clarity and eliminate ambiguity.

Reliability will be maintained by:

Member checking and peer debriefing will be used to confirm that the qualitative data interpretation accurately reflects participant views.

Ethical approval will be sought from a recognized Institutional Review Board.

Informed consent will be obtained from all adult participants and guardians of minors or mentally challenged individuals.

Participants will be fully briefed on the study's aims, confidentiality provisions, and their right to withdraw at any time without consequence.

Pseudonyms and codes will be used instead of real names to protect participant identity.

- Data will be stored securely and only accessible to the research team.
- Access to Participants: Some caregivers of mentally challenged children may be hard to locate or unwilling to participate due to stigma.
- Data Accuracy: Some respondents may provide socially desirable answers, especially regarding institutional compliance with policies.
- Resource Constraints: Limited financial and logistical resources may restrict the geographic scope of the study or prevent the use of advanced analysis tools.
- Language Barriers: In rural areas, translation may be necessary, which could affect the depth and accuracy of responses.

Ethical Considerations

Given the vulnerability of the mentally challenged population, special ethical precautions will be taken:

Researchers will also avoid questions or processes that may cause emotional distress and will make referrals to counseling services if needed.

Limitations of the Study

Despite the comprehensive design, the study may face several limitations:

Efforts will be made to mitigate these challenges through careful planning, stakeholder collaboration, and sensitivity to local contexts.

4. CONCLUSION

This study examined the availability of education for mentally challenged and disabled learners in Zambia. The findings show that although the country has established supportive policies such as the Inclusive Education Policy and the Disability Act, significant challenges limit effective implementation. These include inadequate infrastructure, shortage of trained personnel, limited learning materials and assistive resources, weak monitoring systems, and socio-economic and geographical disparities.

Special education schools remain few, largely urban-based, and often overcrowded, limiting access for learners in rural areas. While inclusive education in mainstream schools has improved access, it is constrained by insufficient teacher training, resources, and institutional support, resulting in limited meaningful inclusion.

The study also highlights the important roles of government and non-governmental organizations in supporting education, though challenges of sustainability, coordination, and resource distribution persist. Additionally, parental involvement and community attitudes significantly influence access, with stigma and lack of awareness contributing to exclusion. Urban–rural disparities and socio-economic factors further restrict equitable access to education. Overall, despite progress in policy development, the practical availability and quality of education for learners with mental challenges remain limited. Strengthening policy implementation, improving resources and training, and enhancing stakeholder collaboration are essential to achieving inclusive and equitable education for all learners.

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