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Peer-Reviewed Research Articles

The Government's Commitment to Free Quality School Education in Sierra Leone: Achievements, Challenges, and Future Directions

Alhaji Bakar Kamara⁵

ABSTRACT

The 1960 UNESCO Resolution and the 1990 World Declaration on Education for All call for action to ensure equality in education and non-discrimination in access to learning opportunities for under-served groups. These documents have influenced national laws and policies worldwide, including the 1991 Constitution of Sierra Leone, which mandates the Government to guarantee equal educational opportunities for all citizens. The Government of Sierra Leone prioritizes education as a critical driver for national development through its Free Quality School Education (FQSE) policy. This paper examines the Government's efforts to implement FQSE across the country. It provides a historical overview of education in Sierra Leone, explores educational system changes, and evaluates education policies over the years. The paper assesses the accessibility and enrollment of school-going children and analyzes the education sector's problems and challenges. The research methods include questionnaires, interviews, observations, discussions, and secondary data from the internet and books. The data will be analyzed qualitatively and quantitatively, with recommendations to improve and strengthen education policies.

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I. INTRODUCTION

In recent years, a strong emphasis has been placed on increasing children's access to education globally. The Education for All goals, established in Jomtien, Thailand, in 1990, reflected a solid commitment by countries to meet basic learning needs for their children. This commitment to improving "Learning for All" was reaffirmed in the Dakar Agenda for Action in 2000, where Goal 6 emphasized improving the quality of education [1]. Millennium Development Goal (MDG) 2 also focused on ensuring all children and youth complete primary school. Although there has been significant growth in the number of children attending school, concerns about the quality of learning persist. The 2012 Education for All Global Monitoring Report estimated that at least 250 million primary school-age children worldwide cannot read, write, or count well enough to meet the minimum learning standards, even after attending school for at least four years [2]. As a result, the focus has shifted from merely providing access to education to ensuring access and learning [3]. The Sustainable Development Goals (SDGs), adopted by the United Nations General Assembly in September 2015 to replace the MDGs, include an education goal emphasizing inclusive and equitable quality education and lifelong learning for all. Furthermore, the World Bank's Strategy 2020 aims to promote country-level improvements in education systems to achieve "learning for all [4]."

This focus on education quality and learning outcomes has increased interest in and demand for national, regional, and international learning assessments. National assessments provide valuable data on education quality and performance within a specific system. In contrast, international assessments allow for comparisons across education systems, enabling countries to share practices, organizational structures, and policies that have proven effective and successful. According to the World Bank (2011) [4], "Some countries achieve much higher levels of educational performance, in terms of system operation as well as outcomes than expected based on their incomes. Detailed and internationally comparable information about education systems helps identify these strong performers in specific areas while also flagging weaknesses in other areas."

The Government's commitment has been crucial in recovering and rapidly improving the

Sierra Leonean education system. The Education Act of 2004 requires all children to complete basic education: six years of primary school and three years of junior secondary school (JSS). This national priority aligns with the internationally agreed-upon educational MDGs, which aim to ensure that all children complete their primary schooling by 2015 and eliminate gender disparities in education. Education is the cornerstone of any society's development, enlightenment, and transformation [5]. It empowers individuals and communities, providing the foundation for prosperity and advancement. Once a key player in British colonial West Africa's education system, Sierra Leone inherited a high-quality British educational framework. However, due to negligence, mismanagement, and corruption, Sierra Leone's education quality has declined. The Government of Sierra Leone continues to promote education at all levels, training competent teachers and improving education to strengthen democracy, develop civic life, and pave the way for economic success.

II. RELATED LITERATURE

2.1 Educational Policies and System Change in Sierra Leone

In 1961, Sierra Leone inherited a bookish type of education from the British colonizers called the 7-5-2-4 system, which included seven years of primary education, five years of junior secondary school, two years of senior secondary school, and four years of tertiary education. However, in 1993, to align with global standards and address the country's educational needs, the system was restructured into the 6-3-3-4 system [6]. This new structure comprised six years of primary school, three years of junior secondary school, three years of senior secondary school, and four years of tertiary education. This change aimed to provide students with a more balanced and comprehensive educational experience. Additionally, the Government introduced various forms of financial support, such as subsidies for school heads and grants for college or university students, to ensure that education is accessible to all, especially low-income families [7, 8].

The Government of Sierra Leone has implemented several initiatives to support education and combat poverty. By subsidizing education costs and providing grants, the Government aims to make education accessible to all citizens, thereby reducing illiteracy and

promoting self-reliance through job opportunities. One significant initiative is the school feeding program, which provides meals to needy students. This program helps students maintain their energy levels and encourages attendance, particularly among children from poor households. By addressing basic needs, the Government helps students concentrate better on their studies, improving educational outcomes.

To enhance the quality of education, the Government has focused on empowering school leaders and teachers through professional development and setting high standards for learning and teaching. Several legislative acts and policies have been introduced to support this goal. For instance, the New Education Policy for Sierra Leone (1995) aimed to provide all citizens access to relevant and functional quality education. This policy laid the groundwork for subsequent legislation strengthening the education system. The Tertiary Education Commission Act (2001) established the Tertiary Education Commission to oversee and improve tertiary education, including budgeting, fundraising, and daily operations.

The Government also recognized the importance of technical and vocational education in fostering practical skills and employment opportunities. The Polytechnics Act (2001) and the National Council for Technical, Vocational, and Other Academic Awards Act (2001) were introduced to regulate and enhance the quality of technical and vocational education. These acts established independent bodies to certify and validate awards, approve institutions, and ensure that the curriculum and examinations met the required standards. This focus on vocational education aimed to provide students with practical skills that would make them more competitive in the job market.

Further reforms were made to the higher education sector and local governance. The Education Act of 2004 provided a comprehensive framework for all levels of education, emphasizing the importance of quality education. The Local Government Act of 2004 aimed to decentralize educational responsibilities, empowering local councils to manage and implement education policies effectively. Additionally, the Universities Act of 2005 facilitated the establishment of multiple universities, promoting higher education accessibility and diversity. New institutions such as the University of Makeni (UNIMAK) and Ernest Bai

Koroma University of Science and Technology (EBKUST) were established, along with the University of Management and Technology (UNIMTECH). The 2007 Education Policy further rebranded and strengthened the 1995 policy, incorporating new principles to fortify the educational landscape in Sierra Leone [7].

2.2 Education for All

Around the world, education receives individual attention and priority because every country needs literate and well-informed individuals for responsible management and service to the nation. The global community recognizes the urgent issues related to primary school enrollment, access to education for girls, early childhood education and care, and the educational and developmental gaps that must be addressed collectively. In response, governments established "Education for All" objectives during the 1990 World Conference on Education for All (WCEFA) in Jomtien, Thailand. This conference, attended by 155 countries, 125 non-governmental organizations, and 33 intergovernmental organizations, expanded the vision for education and renewed the commitment to several key areas [8]: Universalizing access and promoting equality; Dedication to learning; Expanding the means and scope of primary education; Preparing the environment for learning; Strengthening partnerships.

Governments committed to achieving several targets, including expanded early childhood care and developmental activities, improved learning achievement, universal primary education, developed training for youth and adults, reduced adult illiteracy, and increased knowledge and skills for sustainable development [9].

As a Commonwealth member, Sierra Leone is deeply committed to the "Education for All" initiative. The country participated in the follow-up conference organized by the World Education Forum (WEF) [10] in Dakar, Senegal, in 2000. While delegates noted considerable progress in some areas of the previous policies, they also identified several shortfalls. They rebranded their commitment to the Education for All proposal by setting six specific goals, with three aimed to be achieved by 2015. One of the key goals was to ensure that all children, especially girls, children in difficult circumstances, and those from ethnic minorities, have access to free and compulsory primary education of good quality [11].

Global consultative meetings continue to focus on improving education quality. In Africa, further consultative meetings in February 2015 echoed the objective of ensuring equitable and inclusive quality education and lifelong learning for all [12,13]. A Commonwealth report 2015 analyzed educational standards in Sierra Leone, highlighting the country's population at 6,090,000, with a school-aged population of 16% and a birth rate of 4.8. Despite these demographics, the Human Development Index was low at 0.37. The report also noted that the preprimary school life expectancy was 0.07, and the net enrollment rate was average but growing by 0.4 per year. However, the school life expectancy was below average by 0.5 standard deviations and decreased by 0.03 per year.

Sierra Leone has also committed to addressing inequalities, including those related to disabilities, by ratifying the Convention on the Rights of Persons with Disabilities and its Optional Protocol. The gender parity index indicated that primary education had a ratio of 1.00, junior secondary school (JSS) had a ratio of 1.01, and senior secondary school (SSS) had a ratio of 1.01. The dropout rates showed that urban primary dropout rates were 1.3, while rural rates were 1.6. Additionally, the report found that many parents paid for private tutoring for primary-aged children, often due to the pressure to complete the syllabus on time [11].

Regarding the quality of education, funding indicators showed that 11.69% of the GDP was allocated to education, with 8.29% of the national budget directed towards it. The youth literacy rate stood at 90%, and the adult literacy rate at 80%. Specifically, the funding percentages of GDP for different educational levels were 0.79% for preprimary, 1.79% for primary, and 1.60% for JSS. The teacher-student ratios were 22 for preprimary, 26 for primary, 18 for JSS, and 15 for SSS. The proportion of trained teachers was 57% for preprimary, 48% for primary, 73% for JSS, and 75% for SSS. It is important to note that these averages were calculated globally and clustered by Human Development Index levels (Very High, High, Medium, Low) using historical data [12] projected for 2015.

2.3 Quality Education for Quality Life in Sierra Leone

Education in Sierra Leone is not just about acquiring academic skills; it also helps students become resilient, feel connected to their

communities, and aspire for a better future. Education allows children to experience and understand society in all facets, which can profoundly influence their attitudes and behavior. The Government addresses educational challenges by attending to students' psychological and social needs, helping them develop a sense of control over their future and the resilience needed for success [13].

To diversify and develop the country's human resources, the Government has focused on promoting new and sustainable sources of economic growth and improving living standards through education. This effort starts with providing quality primary education for all citizens. The Government's commitment is reflected in its Education Sector Policies, which have positively impacted the enrollment rates in preprimary, primary, and secondary education.

Despite significant improvements, the Government still needs help achieving quality primary education. The Ministry of Education, Science, and Technology has implemented various policies to address these challenges, including the Education Act of 1964, the system change from 7-5-2-4 to 6-3-3-4 in 1993, the New Education Policy in 1995, and several others. These policies aim to enhance the quality of education and promote future growth and development in Sierra Leone.

The Education Act of 2004 aimed to make primary education free and compulsory, but challenges such as affordability, overcrowded schools, and lack of space and materials persisted. Many districts needed secondary schools and essential water and sanitation facilities. The Government aimed to increase access to preprimary education for learners aged 3 to 5 from 11% in 2020 and improve primary school entry and completion rates from 75.4% in 2016 to 85% in 2020 [14]. Efforts also included increasing school infrastructure and facilities across all districts to provide a conducive learning environment.

Improving the quality and relevance of the education system is another essential pillar for achieving high standards of integrity and performance. The Ministry aimed to ensure that at least 50% of primary school children had sufficient learning materials and access to core subject textbooks. Additionally, the Government focused on eliminating examination malpractice by 20% in

2020 through a national strategy and action plan. Based on the 2006 country status report and the 2004 poverty reduction strategy paper, the Education Sector Plan outlines how the Government will continue developing education post-war, aiming for all children to receive quality education by 2015. [15].

2.4 Free Quality Education in Sierra Leone

The state of education in Sierra Leone has faced significant challenges, contributing to widespread failure, poor educational standards, war, corruption, lawlessness, under-development, and backwardness. In response, President Retired Brigadier-General Julius Maada Bio, during his campaign, promised to prioritize education to build human capital, provide skills training, improve health, and protect vulnerable citizens. Believing that developing the human resources of Sierra Leone was the best way to address the country's problems, President Bio introduced the Free Quality School Education (FQSE) initiative [16] under the New Direction policy in August 2018. Demonstrating his commitment, he allocated 21% of the national budget to implement this initiative.

The Free Quality School Education (FQSE) program [16] aims to take control of the education system at the preprimary, primary, junior, and secondary school levels. It seeks to relieve parents and guardians of the financial burden of paying school fees by making education accessible. The Government also provides all pupils with essential learning materials, such as textbooks and exercise books, and supplies teaching materials to all teachers. Additionally, the Government covers school fees and subsidizes school heads of government and government-assisted schools to ensure the provision of furniture, expansion of school infrastructure, and amenities like water and sanitation facilities.

Since introducing FQSE, under President Bio's leadership, the Government of Sierra Leone has distributed over 12 million exercise books and more than 94 containers of core textbooks nationwide. This distribution is supported by teaching and learning materials to enhance the quality of education. The Government has also expanded schools to deprived and underserved areas and introduced a comprehensive school feeding program. These efforts have significantly increased enrollment rates at all levels of schooling.

Rising enrollment rates have necessitated the recruitment of more trained teachers to meet the growing demand. The Government has focused on distributing these teachers nationwide to ensure that every school can effectively educate pupils and students. The Free Quality Education initiative is a top priority for the Government of Sierra Leone and is a vital tool for the country's development and transformation through education.

The Free Quality School Education program [17] represents a significant step towards improving education in Sierra Leone. By addressing financial barriers, providing essential resources, and expanding educational infrastructure, the Government aims to create a more equitable and effective education system. This initiative reflects a commitment to empowering the nation's youth and fostering long-term national development through education.

2.5 New Curriculum in Sierra Leone – National Curriculum Framework

The current Government in Sierra Leone has introduced a new curriculum guideline called the National Curriculum Framework. This framework aims to inspire and guide those responsible for designing, implementing, and managing the new primary education curriculum for Sierra Leone. It promises nine years of quality primary education, as mandated by the 2004 Education Act [18]. The framework seeks to promote national goals such as facilitating equality and radical inclusion, achieving learners' aspirations, improving employability and livelihoods through skills training, and supporting national unity and good governance by celebrating the country's rich cultural diversity. It aims to help children reach their full potential by promoting practices that enhance their overall health and well-being.

The Government has made significant progress in increasing access to education and achieving gender parity. Primary enrollment rose from 1,194,503 in 2010 to 1,770,368 in 2020, while junior secondary enrollment increased from 244,489 to 451,685 in the same period. Gender parity for primary education improved from 0.95 to 1.00. Despite these gains, challenges remain, as 37.2% of primary-school-age children and 22.2% of junior secondary school-age children still need to be in school. Many of these children come from disadvantaged backgrounds, live in remote rural areas, have disabilities, or face other barriers, such

as being orphans or young mothers. The Ministry of Basic & Senior Secondary Education (MBSSE) aims to address these issues by ensuring inclusive economic development and equitable participation in education [19].

To further address these challenges, the MBSSE has established limitations for the new primary education curriculum that reflect advances in education and modern knowledge. The new curriculum emphasizes equity and radical inclusion, supporting children from poor rural areas, urban slums, orphans, street children, adolescent girls, pregnant girls, and children with disabilities. It aims to rebuild confidence in the quality of schools and the integrity of the education system. The curriculum focuses on developing skills in problem-solving, critical and creative thinking, communication, collaboration, and teamwork. It also aims to promote social cohesion, celebrate diversity, and prevent sexual exploitation and gender-based violence.

The new curriculum framework incorporates subjects familiar to teachers in Sierra Leone. Building on the country's history of curriculum innovation, the framework avoids introducing new subjects that could be challenging to implement. Instead, it aligns with the international consensus on essential learning for today's students, based on the work of the Knowledge Metrics Task Force by the UNESCO Institute of Statistics and the Centre for Universal Education at the Brookings Institution [20]. This task force identified seven learning domains critical for success in school and life: Physical Well-being, social and emotional, Culture and the Arts, Literacy and communication, Learning Approaches and Cognition, Numeracy and mathematics, and Science and technology. These domains are integrated into the subject areas and pedagogical methods recommended by the Ministry of Basic Education.

The new primary education curriculum in Sierra Leone consists of Core Subjects and Optional Subjects (Electives) infused with cross-cutting skills such as computational thinking, creativity, critical thinking, communication, collaboration, and teamwork. All subjects at the primary level are presented as core subjects, with six subjects in lower primary and eight in upper primary, to allow more time for literacy and numeracy development. Junior Secondary School (JSS) builds on primary education and prepares students for further general studies, specialist

studies, or the workforce. MBSSE has set a timetable of 30 periods per week for primary schools and 35 periods per week for JSS, with JSS students studying six core subjects and one elective.

In terms of language instruction, MBSSE has directed that the national language commonly used in the school vicinity should be the language of instruction in classes 1-3. From class 4 onward, English became the medium of instruction in all subjects, except for other languages offered as subjects. Arabic is offered in schools where the local community deems it necessary. At the JSS level, schools may provide prevalent indigenous languages in the area, but there is also value in teaching national languages to help preserve cultural heritage. This approach aims to ensure that children develop a strong foundation in their native languages while acquiring proficiency in English and other relevant languages.

2.6 Statement of the Problem

Before the war ended, Sierra Leone's educational system suffered from poor access and completion, underfunding, weak civil capacity, and poor quality of academic outcomes, especially in public schools. There was a lack of solid coordination mechanisms at both local and national levels. The war led to a significant decline in the number and quality of teachers due to displacement and fluid mobility, leaving many schools in remote rural areas with few or no qualified teachers.

Alhaji Bakar Kamara (2020), in his paper "Government Commitment to Quality Education – An Overview of Free Quality School Education in Sierra Leone," emphasizes the Free Quality School Education (FQSE) policy as a critical priority for national transformation through education. Kamara highlights the Government's recognition of education's influence and power in national development and its prioritization as a flagship program. However, while the article provides a historical overview of education in Sierra Leone and changes in the system, it needs to fully explore the Government's interventions in education over the years [21].

The World Bank's 2007 report, "Education in Sierra Leone – Present Challenges, Future Opportunities," noted a remarkable recovery in the educational system, reflected in increased enrollment at all levels. The report highlighted the

Government's commitment to promoting education and equity in resource distribution, suggesting a promising future for the sustainability of the education system. However, this report also needed a detailed analysis of post-war government interventions [22].

Despite these efforts and achievements, significant challenges remain in Sierra Leone's education system. These include persistent access, quality, teacher availability, and resource distribution issues. The ongoing challenges necessitate a thorough assessment of the functionality and impact of the Government's Free Quality Education initiative.

This paper focuses on the strengths and current challenges of education in Sierra Leone. It is crucial to evaluate the effectiveness of the Free Quality Education initiative and understand how well it addresses the ongoing issues within the educational system. By assessing these factors, we can gain insights into the successes and areas needing improvement in Sierra Leone's quest for educational transformation and national development.

Research Objectives

- A. To determine the improvement or strength of Free Quality Education in Sierra Leone
- B. To find out the present challenges of the Free Quality Education in Sierra Leone.
- C. To recommend the measures for improving the Free Quality Education in Sierra Leone.

III. RESEARCH METHODOLOGY

The research methodology involved engaging critical stakeholders in focus group discussions, including representatives from the Ministry of Education, university authorities, and community members. These discussions provided in-depth insights into the topic under review, allowing for a comprehensive understanding of education's current state and various initiatives' impact. By incorporating the perspectives of those directly involved in the education sector, the research aimed to capture a holistic view of the challenges and successes experienced within the system.

In addition to the focus group discussions, the research sought supplementary information from existing literature published by relevant institutions, particularly the Ministry of Education

and universities. This approach ensured the study was grounded in documented evidence and aligned with ongoing educational policies and frameworks. The scope of the research was limited to the Western Area, providing a focused geographical context for analyzing the implementation and effectiveness of academic programs and initiatives in Sierra Leone.

3.1 Research Design

The research design primarily employed an analytical approach, gathering data through primary methods to comprehensively understand the topic under review. Both stratified and simple random sampling techniques were used to ensure a diverse and representative sample. Stratified sampling involved selecting a specific group of internal interviewees, including authorities from the Ministry of Education, universities, and community leaders. This method allowed for targeted insights from key stakeholders who play strategic roles in the education sector, ensuring that the research captured a wide range of perspectives and experiences.

Questionnaires were administered to officials and lecturers from the Ministry of Education, universities, and other relevant organizations to collect quantitative data. These questionnaires were designed to elicit detailed responses on various aspects of the educational system, including policy implementation, resource allocation, and the overall effectiveness of the Free Quality Education initiative. Simple random sampling for the distribution of questionnaires ensured that the data collected was unbiased and representative of the broader population within these institutions. This approach helped to gather objective, quantifiable data that could be analyzed to identify trends and patterns.

The combination of stratified and simple random sampling techniques provided a robust framework for the research design, allowing for a thorough and balanced analysis. By engaging with both high-level authorities and ground-level officials, the research was able to integrate strategic insights with practical, on-the-ground experiences. This methodological approach ensured that the research findings were comprehensive, reflecting the complexities and nuances of the education system in the Western Area. The analytical nature of the research design, supported by primary data collection, enabled a

detailed examination of the current state of education and identified critical areas for improvement.

3.2 Population and Sample

The research population comprised a diverse group of individuals from various sectors within the education system, including administrative and academic staff from the Ministry of Education and universities. To ensure a comprehensive analysis, members from these groups were strategically selected. Additionally, other department members were randomly chosen for interviews. Random sampling among the staff was crucial for capturing a wide range of perspectives and identifying trends and correlations in their views. This approach ensured that the data reflected the opinions and experiences of officials, lecturers, and community authorities from different departments and levels, including senior and head-of-department positions.

The stratified population was divided into two main groups. The first group included internal interviewees from different Ministry of Education and university departments. These participants provided insights into the strategic and operational aspects of the education system. The second group comprised community members participating in personal interviews and focus group discussions. This division allowed the research to gather comprehensive data from both institutional and community perspectives, ensuring a holistic understanding of the educational landscape in Sierra Leone. Engaging with community members was particularly important for capturing the on-the-ground realities and challenges students and parents face.

The research employed primary and secondary sources to gather the necessary data. Primary data were collected through questionnaires administered to officials and lecturers, interviews, and focus group discussions with community members. These methods provided firsthand insights into the experiences and opinions of the participants. Secondary data were sourced from existing literature, official reports, and publications from the Ministry of Education and universities. This combination of data sources ensured a robust and well-rounded analysis, allowing the research to draw well-supported conclusions about the effectiveness of educational initiatives and the current state of education in the Western Area.

3.3 Research Instrumentation

The research employed a variety of data collection instruments to ensure a comprehensive and nuanced understanding of the educational landscape in Sierra Leone. These instruments included personal interviews, questionnaires, focus group discussions, and literature reviews.

Personal Interviews: Personal interviews were conducted with key stakeholders, including officials from the Ministry of Education, university authorities, and community leaders. These interviews provided in-depth insights and allowed for detailed discussions about specific challenges and successes within the education system. The face-to-face nature of these interviews facilitated a deeper understanding of the participants' personal experiences and perspectives.

Questionnaires: Questionnaires were administered to a broader group of participants, including teachers, lecturers, and administrative staff. These questionnaires were designed to gather quantitative data on various aspects of the education system, such as enrollment rates, availability of resources, and satisfaction levels with the Free Quality Education initiative. Using questionnaires allowed for data collection from a large sample size, ensuring that the findings were representative and statistically significant.

Focus Group Discussions: Focus group discussions were held with different groups within the community, including parents, students, and local leaders. These discussions allowed participants to share their experiences and views collaboratively, highlighting common issues and generating collective insights. The interactive nature of focus group discussions helped uncover the community's dynamics and shared concerns regarding the education system.

Literature Reviews: Secondary data were collected through literature reviews of existing publications, reports, and official documents from the Ministry of Education and universities. This review provided a context for the primary data, allowing the research to be grounded in existing knowledge and to build upon previous findings. Literature reviews helped to identify trends, gaps, and best practices in the education sector, contributing to a more comprehensive analysis.

By utilizing these diverse data collection instruments, the research gathered rich and varied

data, ensuring a robust and well-rounded understanding of the educational challenges and opportunities in Sierra Leone.

IV. DATA PRESENTATION AND ANALYSIS

The data analysis section evaluates the impact and effectiveness of the Free Quality Education (FQE) initiative in Sierra Leone by examining government expenditure, teacher recruitment, school facilities, and materials provided. The analysis, based on surveys, interviews, and focus group discussions with key stakeholders, reveals significant improvements in government support, such as increased funding, more teachers, and higher salaries. However, challenges remain, including the delayed and insufficient payment of subsidies and a lack of essential school facilities like playing fields, laboratories, and technology labs. The provision of basic materials like desks and chairs also needs improvement. These findings highlight the progress and ongoing efforts required to ensure quality education for all students in Sierra Leone.

4.1 Strength/Impact Of Free Quality Education

Table 4.1: Strength/Impact of Free Quality Education

Strength/impact of FQE	YES	NO	%YES	%NO
Expenditure in education	20	0	100	0
Total responses	20		100	
Increased more teachers	20	0	100	0
Total responses	20		100	
Paid more subsidies	20	0	100	0
Total responses	20		100	
The Government increases the payment of a fee	20	0	100	
Total responses	20		100	
School feeding program	6	14	30	70
Total responses	20		100	
Increased teachers' salaries	20	0	100	0
Total responses	20		100	
School materials in school	20	0	100	0
Total responses	20		100	
Approved more school	20	0	100	0
Total responses	20		100	
Increase students enrollment	20	0	100	0
Total responses	20		100	
More facilities for physically challenged students	18	2	90	10
Total responses	20		100	

Improved school structure	19	1	95	5
Total responses	20		100	

In Table 4.1, the Free Quality Education (FQE) initiative in Sierra Leone has demonstrated significant strengths and positive impacts across various aspects of the education system. The Government has shown a strong commitment by increasing expenditure on education, hiring more teachers, paying more subsidies, and covering school fees for students in government and government-assisted schools. These efforts have ensured that education is more accessible and affordable for all students. Additionally, the provision of teaching and learning materials, along with increased teachers' salaries, has dramatically enhanced the quality of education.

The initiative has also led to the approval of more schools, resulting in higher student enrollment rates. This indicates that the financial and accessibility barriers to education are being effectively addressed. The Government's focus on

improving school infrastructure and providing adequate facilities for physically challenged students ensures inclusivity and equal opportunities for all learners. These measures contribute to a more equitable and supportive learning environment, which is crucial for students' development.

However, some areas need further improvement, particularly the school feeding program, which only 30% of respondents reported. Expanding and effectively implementing this program can help address hunger and nutritional needs, improving student attendance and concentration. Overall, the FQE initiative has significantly enhanced Sierra Leone's education quality. Still, continuous efforts are needed to ensure all students fully benefit from these educational reforms.

Table 4.2: Independent Officers Operating in School

Officers	Yes	No	%Yes	%No
Bursar	14	6	70	30
Total	20		100	
Vice Principal	16	4	80	20
Total	20		100	
Examination office	8	12	40	60
Total	20		100	

Staff room	18	2	90	10
Total	20		100	
Games and Sport	4	16	20	80
Total	20		100	

Table 4.2 shows the presence of independent school officers who play a crucial role in the efficient management and operation of educational institutions. According to the data in Table 4.2, bursars are present in 70% of the schools, with 14 out of 20 schools having this officer. Bursars are essential for managing school finances and ensuring funds are appropriately allocated and spent. The absence of bursars in 30% of the schools indicates a gap in financial management, which could affect the efficient use of resources.

Vice principals are present in 80% of the schools, with 16 out of 20 schools reporting their presence. Vice principals assist principals in administrative duties and play a key role in maintaining discipline and overseeing students' academic progress. The absence of vice principals in 20% of the schools suggests that those schools may need help managing their administrative workload and maintaining educational standards.

The presence of an examination office is less common, with only 40% of the schools having one. This indicates that 60% of the schools need a dedicated office to handle examination-related activities, which could impact the organization and administration of exams. The data also shows that staff rooms are available in 90% of the schools, providing a space for teachers to collaborate and prepare for classes. However, only 20% of the schools have dedicated games and sports officers, highlighting a significant gap in promoting physical education and extracurricular activities. The lack of such officers in 80% of the schools may limit students' opportunities for physical development and teamwork skills.

Table 4.3 Available School Facilities for Students

Facilities	Yes	No	%Yes	%No
Toilets	18	2	90	10
Total	20		100	
Playing field	3	17	15	85
Total	20		100	
School Garden	2	18	10	90
Total	20		100	

School Laboratory	2	18	10	90
Total	20		100	
Library	8	12	40	60
Total	20		100	
School store	14	6	70	30
Total	20		100	
Technology lab	2	18	10	90
Total	20		100	

The data in Table 4.3 provides insight into the availability of various school facilities for students in Sierra Leone. Toilets are widely available, and 90% of schools have this essential facility. This high percentage reflects the Government's efforts to provide basic sanitation and hygiene facilities in schools, which are crucial for the health and well-being of students. However, the absence of toilets in 10% of the schools indicates that there is still room for improvement to ensure that all students have access to these basic amenities.

In contrast, the availability of other essential facilities is significantly lower. Only 15% of the schools have a playing field, and just 10% have a school garden, laboratory, and technology lab. The lack of these facilities highlights a significant gap in providing a holistic educational experience that includes physical activities, practical science education, and technological skills development. The absence of playing fields limits sports and physical education opportunities, which are

essential for students' physical health and teamwork skills. Similarly, the lack of laboratories and technology labs restricts students' hands-on learning experiences and ability to engage with modern technology.

The data also shows that only 40% of schools have a library, which is essential for fostering a reading culture and providing students access to a wide range of learning resources. The absence of libraries in 60% of the schools is a significant concern as it limits students' ability to engage in self-directed learning and research. On a positive note, 70% of the schools have a school store, which can help store educational materials and supplies. Overall, the data indicates that while some basic facilities are in place, there is a significant need to improve the availability of critical educational facilities to enhance the learning environment for students in Sierra Leone.

Table 4.4: Material Supplied by the Government

Materials	Yes	No	%Yes	%No
Textbooks	20	0	100	0
Total	20		100	
Exercise books	20	0	100	0

Total	20		100	
Desk	0	20	0	100
Total	0		100	
Registers	8	12	40	60
Total	20		100	
Chairs	4	16	20	80
Total	20		100	
Blackboard	2	18	10	90
Total	20		100	
Chalks	10	10	50	50
Total	20		100	

The data in Table 4.4 shows the distribution of various educational materials supplied by the Government to schools in Sierra Leone. Textbooks and exercise books have been universally provided, with 100% of schools receiving these essential learning materials. This is a significant strength of the Government's initiative, ensuring that all students have access to crucial educational resources necessary for their studies.

However, other critical materials are less widely distributed. Desks are absent in most schools, with 0% reporting receipt of this essential furniture. This indicates a significant gap in providing basic infrastructure, which can affect students' comfort and ability to focus during lessons. Similarly, only 20% of schools have received chairs, and just 10% have been supplied with blackboards, highlighting significant deficiencies in classroom furnishings and teaching aids. These items can help effective teaching and

learning, as students and teachers need more tools for a conducive learning environment.

Registers, used for maintaining student attendance records, are present in only 40% of schools, suggesting a need for improved administrative support. Chalk, another primary teaching material, has been supplied to 50% of the schools, indicating that half may need help with basic classroom instruction due to a lack of this essential item. Overall, while the Government has made commendable efforts to supply textbooks and exercise books, there is a clear need for increased provision of furniture, teaching aids, and administrative materials to fully support the educational needs of students and teachers in Sierra Leone.

Table 4.5: Government Support to Schools

Subsidies	Yes	No	%Yes	%No
Paid	20	0	100	0
Total	100		100	
On-time payment	0	20	0	100
Total	20		100	
Enough subsidies	0	20	0	100
Total	20		100	

The data in Table 4.5 provides insight into the Government's financial support to schools in Sierra Leone through subsidies. While the Government has successfully paid subsidies to all schools, as indicated by 100% of the respondents confirming receipt of payments, there are significant issues related to the timing and sufficiency of these payments.

Despite the universal payment of subsidies, none of the schools reported receiving these payments on time. This 100% delay in payment can create financial instability for schools, hindering their ability to effectively plan and manage their resources. Timely financial support is crucial for the smooth operation of schools, affecting everything from paying staff to purchasing necessary supplies.

Furthermore, all respondents indicated that the subsidies provided were insufficient to meet their needs. This 100% insufficiency highlights a critical gap in the Government's funding. Insufficient subsidies mean that schools may need help covering basic expenses, potentially impacting the quality of education they can offer. Due to this financial shortfall, schools may need help maintaining infrastructure, purchasing educational materials, and supporting various school programs.

Therefore, while the Government's effort to provide subsidies to schools is commendable, delayed and insufficient payments significantly undermine the effectiveness of this support. Addressing these issues by ensuring timely and adequate financial assistance is essential for

improving the overall educational environment and outcomes in Sierra Leone.

4.2 Strength/Impact of Free Quality Education

Objective 1: Evaluate the Government's Expenditure on Education

The Free Quality Education (FQE) initiative has seen a significant increase in government expenditure on education, which all the heads of the twenty schools under study unanimously confirmed. Each head (100%) agreed that the Government has substantially raised its financial commitment to education. This increased funding has enabled schools to improve their infrastructure, supply essential educational materials, and support various academic programs. The unanimous agreement among school heads underscores the Government's dedication to enhancing the educational landscape in Sierra Leone through substantial financial investment.

Objective 2: Assess the Increase in Teacher Recruitment and Salaries

Another critical impact of the FQE initiative is the increase in teacher recruitment and salaries. All twenty school heads (100%) confirmed that the Government has significantly increased the number of teachers in schools, addressing the teacher shortage issue. Additionally, the Government has raised teachers' salaries, with all respondents acknowledging this improvement. These measures have not only helped to reduce student-to-teacher ratios but have also boosted teacher morale and retention. The enhanced teacher workforce is

crucial for improving the quality of education and ensuring that students receive adequate attention and support in their learning journey.

Objective 3: Examine the Provision of School Facilities and Support Programs

The Government's efforts have also extended to providing school facilities and support programs. All school heads reported that the Government has consistently paid more school subsidies and covered examination fees for WASSCE, BECE, and NPSE candidates, making education more accessible. While there is unanimous agreement (100%) on the increased supply of school materials and approval of more schools, only 30% of school heads acknowledged an increase in school feeding programs, indicating a need for further improvement. Additionally, the Government has provided more facilities for disabled students and improved school infrastructure, with all heads agreeing on these points. However, only 30% of heads believed that there are adequate teachers in all schools, suggesting a need for continued focus on teacher distribution, especially in rural areas. These efforts reflect the Government's commitment to creating a supportive and inclusive educational environment, though some areas still require attention to achieve comprehensive improvements.

4.3 The Problem/Challenges of Education in Sierra Leone

One of the significant challenges facing the education system in Sierra Leone is the need for more teachers in schools. All twenty school heads (100%) agreed that there are not enough teachers to meet the demands of their schools. This shortage is more pronounced in rural areas, where schools often need help to attract and retain qualified teachers. The lack of adequate teaching staff impacts the quality of education, leading to larger class sizes and overburdened teachers, which can hinder effective teaching and individualized student support. The equitable distribution of teachers remains a critical issue that needs urgent attention to ensure that all students receive a quality education.

Another significant problem is the need for more trained and qualified teachers. All school heads (100%) confirmed that not all teachers possess the necessary training and qualifications. This issue is particularly severe in rural schools, where trained and qualified teachers need to be

improved. The absence of adequately trained educators compromises the standard of education, as unqualified teachers may need to gain the skills or knowledge required to deliver effective instruction. This gap in teacher qualifications underscores the need for enhanced teacher training programs and professional development opportunities to ensure that all educators are well-prepared to meet the educational needs of their students.

Teacher compensation and support also pose significant challenges. While the Government has increased teachers' salaries, all twenty school heads (100%) agreed that these salaries are still insufficient to meet the cost of living in Sierra Leone. Furthermore, no special allowances exist for teachers deployed to rural areas, making it difficult to attract qualified teachers to these underserved regions. Additionally, the lack of scholarships for teachers' children to study in universities adds to the financial burden on teachers. These issues contribute to low teacher morale and retention rates, particularly in rural areas with more pronounced challenges. Addressing these problems requires comprehensive policies that include better compensation, allowances for rural teachers, and support for teachers' families to improve their living and working conditions.

4.4 Schools Leadership/Administration

Trained and Qualified Teachers

The presence of trained and qualified teachers is critical for effective school leadership and administration. According to the data, 13 out of 20 school heads (65%) are trained and qualified, while 7 (35%) lack the necessary qualifications. This discrepancy indicates that a significant portion of school leadership must have the formal training to manage educational institutions effectively. The lack of qualified leadership can affect the overall quality of education, as these leaders may need to be fully equipped to address the complex challenges that schools face. Ensuring that all school heads receive proper training and qualifications is essential for improving educational outcomes.

Promotion Pathways

The pathway to leadership positions in schools is also a matter of concern. Fourteen school heads (70%) attained their positions by following the prescribed educational policies and

promotion pathways, while six heads (30%) achieved their roles without adhering to these procedures. This bypassing of standard protocols can undermine the integrity and effectiveness of school leadership. Leaders who have yet to progress through the proper channels may need more experience and understanding of the educational system's intricacies, potentially leading to administrative inefficiencies and poor decision-making. Enforcing strict adherence to promotion policies is crucial to ensure that only qualified and experienced individuals lead schools.

Appointment Letters from the Ministry of Education

The legitimacy of school leadership is further questioned by the fact that only 3 out of 20 school heads (15%) could produce their appointment letters from the Ministry of Education. This low percentage suggests a need for more formal recognition and oversight in appointing school leaders. With official appointment letters, the accountability and authority of these leaders are maintained, potentially leading to administrative inconsistencies and a lack of trust among staff and students. Strengthening the issuing and verifying appointment letters is necessary to establish clear lines of authority and accountability in school administration.

V. FINDINGS, CONCLUSION, AND RECOMMENDATIONS

The research highlights several critical issues within the educational leadership and administration in Sierra Leone. Many teachers report that their salaries are too low to meet the cost of living, exacerbating the challenges they face in their professional and personal lives. The need for more teaching and learning materials, inadequate school infrastructure, and poor monitoring and inspection of schools further complicate the educational landscape. Additionally, the late payment of subsidies, lack of libraries and computer labs, and frequent power outages hinder the learning environment. Addressing these issues requires comprehensive strategies, including better salary structures, timely subsidy payments, improved infrastructure, and enhanced training and support for school leaders. Moreover, providing special allowances for rural teachers, offering scholarships for teachers' children, and enforcing promotion policies can help attract and retain qualified educators, ultimately improving Sierra Leone's education quality.

5.1 Conclusion

Education is essential for improving the lives of citizens, and its quality needs significant attention and support from the Government. The Government of Sierra Leone has committed to promoting quality education by prioritizing it in the national budget. This commitment includes increasing teachers' salaries, approving more teachers for schools, and paying school fees for WASSCE, BECE, and NPSE candidates. The Government has also supplied schools with essential materials such as textbooks and exercise books, increasing enrollment. Additionally, more schools have been approved, and facilities for disabled students have been improved, along with more opportunities for science students and girls' education.

Despite these efforts, significant challenges remain that could undermine the quality of education in Sierra Leone. Timely and sufficient financial support is crucial, but schools must receive subsidies on time, and the amounts provided need to be increased to cover essential expenses. Schools need help with the high cost of living, making it difficult to maintain infrastructure, pay staff, and provide necessary materials. Teacher salaries remain low, affecting their ability to secure basic needs for themselves and their families. The need for more teaching and learning materials continues to impact the efficiency of education.

Overcrowded classrooms are another pressing issue, highlighting the need for more classroom construction to accommodate the increasing number of students. Rural schools, in particular, need more trained and qualified teachers. The Government needs to implement effective mechanisms to motivate teachers to prefer teaching in village schools instead of urban areas. Furthermore, the Ministry of Education's monitoring and inspection of schools need to be improved, with reports of inspectors prioritizing personal gains over thorough inspections. The emphasis on research and technology needs to be improved, with insufficient school computers and library books.

Moreover, the country faces broader socio-economic challenges such as hunger, hardship, and the high cost of living, which impede students' ability to maintain quality education. Continuous support and sponsorship are necessary for learners, but economic barriers hinder these.

Additionally, constant electricity and affordable internet access still need to be improved, further affecting education. Addressing these issues is crucial for improving the quality of education in Sierra Leone and ensuring that all students have the opportunity to succeed.

5.2 Recommendations for Government, NGOs, Civil Society Organizations, and Community Leaders

The Government must construct and rehabilitate roads leading to various schools nationwide to ease accessibility, improve the educational infrastructure, and ensure adequate seating accommodations for pupils nationwide.

Improve Conditions of Service for Teachers: The Government should enhance the conditions of service for teachers in Sierra Leone to match the current geometric increase in the general price level of goods and services.

Harmonize Salaries of Civil Servants: The Government of Sierra Leone (GoSL) should harmonize the salaries of all civil servants based on their qualifications to retain trained and qualified teachers in the classroom and ensure a stable future for the next generation.

Provide School Facilities: The Government should equip schools with improved laboratories, standard libraries, and other essential facilities to enable pupils to conduct their research effectively.

Ensure Adequate Electricity Supply: The Government should provide adequate and constant electricity to all schools. Electricity is crucial for operating most modern educational tools and appliances, such as computers, printers, and projectors.

Provide Internet Facilities: All schools should provide constant Internet facilities to allow pupils to conduct research and complete assignments efficiently.

Increase Allowances for Rural Teachers: The Government should increase allowances for teachers in rural areas to attract and retain qualified educators in these regions.

Recruit More Teachers: To address the growing pupil population, the Government of Sierra Leone should recruit more teachers to ensure a manageable student-to-teacher ratio.

Implement Effective School Feeding Programs: The Government should ensure an effective and adequate school feeding program in all primary schools nationwide to promote better learning outcomes.

Improve Infrastructure and Recruit Qualified Teachers: The Government should recruit more trained and qualified teachers and improve the infrastructural facilities in schools to provide a conducive learning environment.

Increase Electricity Supply: The Government should ensure a reliable electricity supply to all schools to support educational activities and modern technologies.

Provide Computers and Internet Facilities: The Government should equip schools with computers and ensure Internet facilities are available to support digital learning.

Timely Payment of Subsidies: The Government should ensure that subsidies are paid before the start of the new academic school year and that these subsidies are increased to meet the rising cost of living.

Equip Laboratories and Libraries: The Government should provide all schools with well-equipped laboratories and standard libraries to enhance the quality of education and support student research and learning activities.

By implementing these recommendations, the Government, NGOs, civil society organizations, and community leaders can significantly improve Sierra Leone's education quality and ensure that all students have the resources and environment needed to succeed.

VI. LIMITATION AND FURTHER RESEARCH DIRECTION

6.1 Limitations

One significant limitation of this research is the geographic constraint, as the study is confined to the Western Area of Sierra Leone. This restriction may not accurately reflect the educational landscape across the country, where conditions vary widely between urban and rural regions. The focus on the Western Area means that the findings might not account for schools' unique challenges in remote or less developed areas, such as limited access to resources, infrastructure deficits, and a lack of qualified teachers. Consequently, the results

need to be more generalizable to the broader context of Sierra Leone's educational system.

Another limitation is the reliance on self-reported data from questionnaires, interviews, and focus group discussions. While these methods provide valuable insights, they are subject to biases such as social desirability bias, where respondents may provide answers they believe are expected rather than their genuine opinions or experiences. Additionally, the accuracy of the data may be compromised by respondents' recall ability and willingness to share candidly, especially if discussing sensitive issues like financial management, school performance, or governmental support. These factors can affect the reliability and validity of the findings, potentially leading to an incomplete or skewed understanding of the educational challenges and successes.

Furthermore, the study's methodological approach includes both stratified and simple random sampling techniques, which, while robust, still face inherent limitations. Stratified sampling ensures that key stakeholders are represented, but it might miss the nuances experienced by less prominent groups within the educational system. On the other hand, simple random sampling might not capture the full spectrum of perspectives due to the random selection. Combining these methods provides a balanced view but does not eliminate the risk of sampling bias. Additionally, excluding secondary sources and existing literature reviews as a significant part of the data collection process could limit the study's depth, as it might overlook relevant historical and policy contexts crucial for a comprehensive analysis.

6.2 Future Research Direction

Future research on the Free Quality Education (FQE) initiative in Sierra Leone should expand beyond the Western Area to include a more comprehensive geographic scope that encompasses rural and remote regions. This broader study would help identify regional disparities and tailor educational policies to address the unique challenges schools face in different parts of the country. Understanding these variances can lead to more targeted interventions and equitable resource allocation, ensuring that all students benefit equally from the FQE initiative regardless of location.

Another important direction for future research is to incorporate longitudinal studies that track the long-term impacts of the FQE initiative on educational outcomes. Such studies would provide valuable insights into how sustained government investment in education influences student performance, retention rates, and overall school quality over time. Longitudinal data also helps assess the effectiveness of specific interventions and policies, allowing for adjustments and improvements based on empirical evidence. This approach could highlight the initiative's successes and areas needing continuous support or modification.

Finally, future research should explore the role of technology and innovation in enhancing educational quality and access. Investigating how digital tools and online learning platforms can supplement traditional teaching methods, especially in under-resourced schools, would be highly beneficial. Researchers could focus on integrating technology into the curriculum, training teachers to use digital tools, and evaluating the effectiveness of e-learning in improving educational outcomes. By leveraging modern technological advancements to bridge these gaps, this focus on technology could solve some identified challenges, such as the lack of trained teachers in rural areas and insufficient educational materials.

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The Slow Pace of Mexico's Labor Market Recovery After COVID-19

Roberto Gutierrez-Rodriguez^δ

ABSTRACT

This document aims to assess the recovery of Mexico's labor market following the COVID-19 pandemic. In 2020, the country experienced a significant decline in gross domestic product, the most severe since the crisis of 1982, which also had a profound impact on labor market conditions. The economy was heavily reliant on oil exports, and the country faced challenges due to low oil prices and a sharp increase in international interest rates, as it was one of the most indebted countries globally. The analysis in the document relies solely on official data and employs comparative statistical methods. The hypothesis posits that four years after the 2020 crisis, Mexico's per capita GDP and most labor market indicators have not fully recovered to pre-pandemic levels. While the potential for recovery exists, various factors, including government actions and external conditions, have significantly altered the landscape. Internally, Mexico has implemented a range of social programs aimed at boosting basic incomes, albeit at the expense of capital investment and human capital development, particularly in education, training, health, capacity building, and science and technology. Externally, barriers to free trade and foreign investment have been erected, clouding Mexico's short-term economic outlook.

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I. INTRODUCTION

The National Institute of Statistics and Geography of Mexico (INEGI) is responsible for the

National Information System (SNI), from which the National Accounts System (SCN) is generated. This system relies on censuses, surveys, and administrative registers processed or adapted to the SCN by INEGI. The two most important surveys

are largely the National Household Income and Expenditure Survey (ENIGH) and the National Survey of Occupation and Employment (ENOE). The ENIGH is conducted every other year based on a sample of over 105,000 families. The ENOE is conducted quarterly and involves 132,000 families, with a fifth of the sample visited each quarter in a rotating manner to ensure 80% of the sample is revisited from the previous quarter.

According to ENIGH, two-thirds of Mexicans' current income corresponds to labor activities. This suggests that the labor market was likely the main driver of the increase in household income during 2016–2024 as reported by the ENIGH 2022 and the ENIGH 2024 (INEGI 2025a and 2025b). To sustain this trend, it is important to have not only political will manifested in yearly minimum wage increases and the expansion of social programs to supplement the income of vulnerable individuals, both depending on the Executive mandate, but also to improve economic growth and attend to labor market conditions. A complementary source for INEGI's labor market information is the administrative register of the Mexican Institute of Social Security (IMSS), to which employees working for a private entrepreneur must be incorporated to have access to social security benefits, granted by law.

To assess the extent of Mexico's labor market recovery post-COVID-19, the study must examine the pre-pandemic, pandemic, and post-pandemic labor market conditions. The reasons behind the consistently low average wages, labor force participation, labor productivity, and other vulnerabilities in the labor market should be examined. These issues have been somewhat hidden by the increase in minimum wages and significant government support through social programs from 2019–2024.

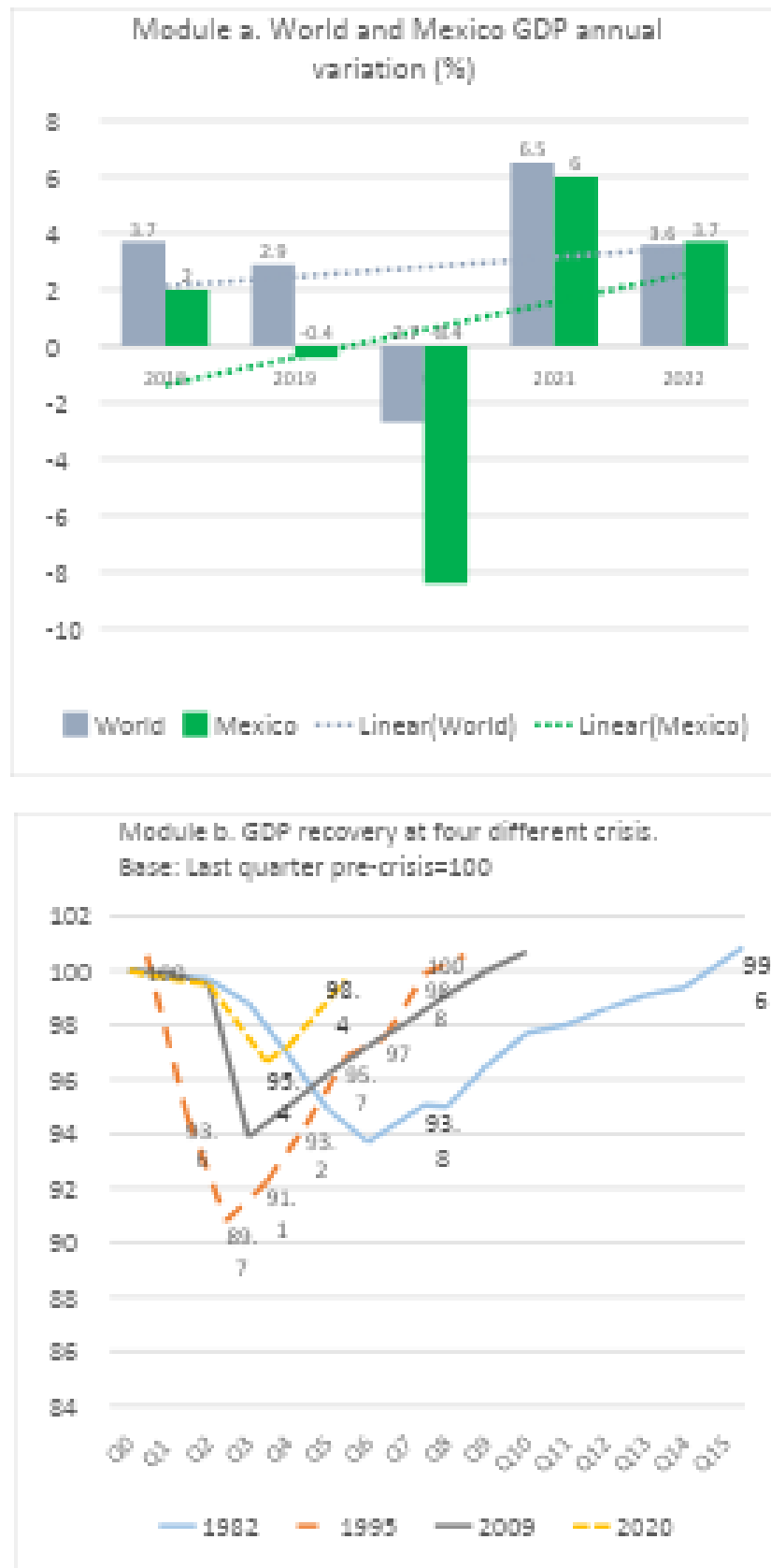
To carry out the analysis, the work is divided into five parts. In the first part, the situation for the economy and the labor market during the period 2018–2022, in which the pandemic is involved, is analyzed, referring to the point of view of some experts and institutions who predicted a rapid and full recovery. In the second part, the increase of the minimum wage, which started before 2019, is analyzed. The third part analyzes the extent to which the Mexican labor market operates considering its weaknesses and inconsistencies, especially the informal sector and the low level of the inactivity rate, which in Mexico evokes

occupation more than employment. The fourth part analyzes the distortions of the labor market accentuated during 2018–2024 because of the more than 20% annual average increase in the minimum wage. Finally, a results and discussion section is added, as well as the conclusions.

II. THE OFFICIAL IDEA OF RECOVERY

As early as late 2021, both the Secretariat of Finance and Public Credit (SHCP) and various academics proclaimed that the economy had returned to the level it was before the COVID-19 pandemic, citing two key factors. First, following a significant decline in Mexico's Gross Domestic Product (GDP) in 2020 (–8.4%), which was three times deeper than the global average (–2.7%), the economy grew by 6.5% in 2021, surpassing the global average growth rate of 6%, as depicted in Figure 1, module a. Second, based on the quarter indexes set at 100 before the crisis, the recovery after the 2020 crisis was the quickest and most seamless among the four major Mexican crises between 1982 and 2020. The corresponding V-shaped line for that year indicates that the lowest point reached was 95.4, with the recovery spanning over 5 quarters. These figures are lower than those for the other crises: 93.6 for 2019, which recovered after 10 quarters; 93.8 for 1982, which recovered after 15 quarters; and 89.7 for 1995, which recovered after 8 quarters, as shown in module b.

Figure 1: Post-COVID-19 world-Mexico recovery (module a) and GDP recovery in Mexico after four crises (module b)



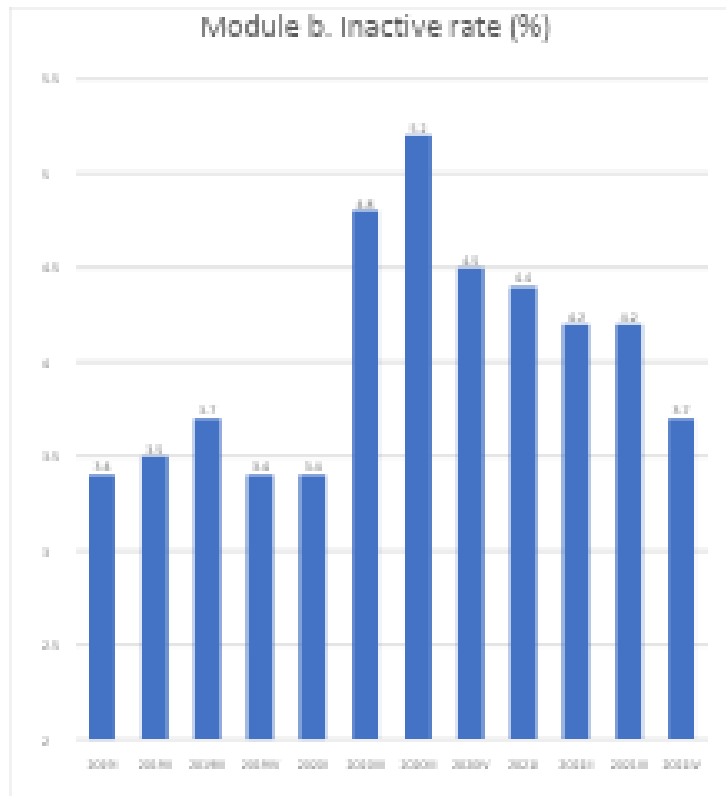
Source: INEGI (2025a) and World Bank (2025).

Furthermore, the SHCP and some academics stated at that time that the number of formally paid registered workers of the private sector with the IMSS reached its lowest point in the third quarter of 2020 but then reversed course and exceeded the pre-2020 COVID-19 levels by the third quarter of 2021. This is illustrated in Figure 2, module a, where the left axis shows the number of IMSS formal workers (constant line). Additionally, the GDP in constant 2013 prices is depicted on the right axis

with a dotted line, indicating that its level in the fourth quarter of 2021 is equivalent to that of the first quarter of 2019. In terms of the ENOE, which includes both formal and informal workers, the inactivity rate (not the unemployment rate, which is frequently associated with formal jobs) is shown in module b. The underlying inactivity rate in the fourth quarter of 2021 was 3.7%, slightly higher than the 3.4% recorded in the first quarter of 2019

Figure 2: GDP at 2018 prices in trillion pesos, and millions of formal workers registered to IMSS (module a), and total labor force inactivity rate in % (module b)





Source: IMSS (2025) and INEGI (2025a)

As will be seen later, the signs already shown were not enough to provide a clear picture in 2022 of the recovery of both GDP per capita and the quantity of employment demanded by the economy, at least at the pre-crisis level. Furthermore, due to different reasons, the quality became rather elusive.

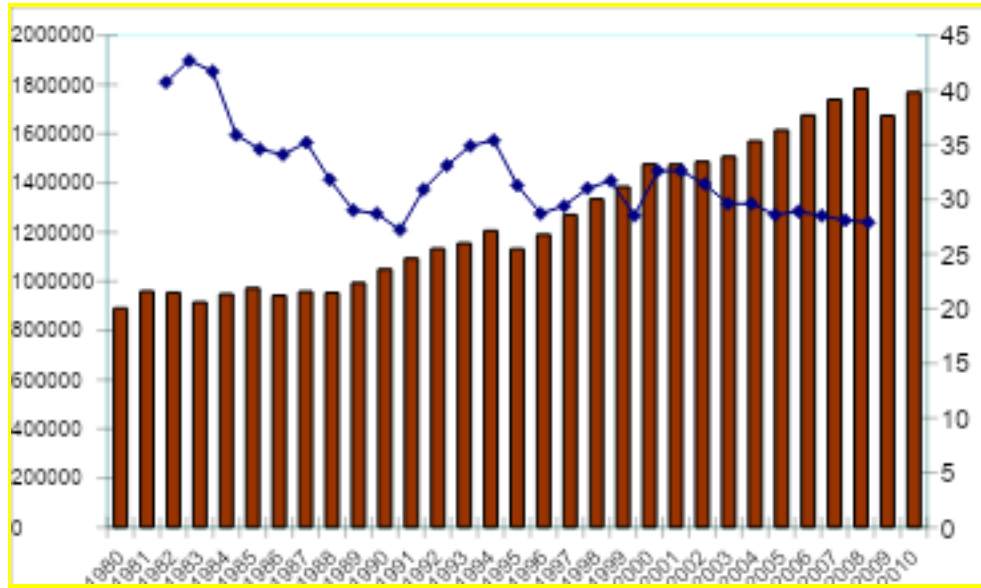
III. THE UPWARD IMPULSE TO THE MINIMUM WAGE

In 2012, the public administration headed by Felipe Calderón (2007–2012) came under strong pressure from society and consequently granted some adjustments in favor of the recovery of the minimum wage, which consisted of a reclassification of three geographic areas in 2012 and 2015 to unify them into one, and there was an extraordinary increase in the salary in 2016 and 2019. The social pressures, initiated at the end of President Calderón's administration and intensified under President Peña Nieto (2013–2018), led to a national debate regarding the need to increase the minimum wage to approach the constitutional maximum of providing material, social, and cultural support for workers and their families, and promoting compulsory education for children.

Under pressure, in December 2015, the Council of Representatives of the National Minimum Wage Commission (CONASAMI), composed of representatives of workers, employers, and the government, agreed to subtly restore workers' purchasing power in line with the following year's inflation expectations. On December 20, 2015, it announced a 4.2% increase in the minimum wage that would take effect during 2016, setting it at 73.04 pesos per day (p/d) nationwide, arguing that inflation in 2015 would close at just over 2%. Furthermore, the promotion of a higher minimum wage should be accompanied by sustained economic growth, controlled inflation, and high labor productivity. Additionally, it argued that between November 2012 and October 2015, geographic areas C and B, which had the lowest wage levels, had been eliminated, thus unifying the country into a single area. However, it was not mentioned that between 1976 and 2014, the minimum wage had lost 74% of its purchasing power, nor was there any mention of its poor international standing, as shown in Figure 3. As it seems evident, while the GDP, recorded on the vertical axis and expressed in the bars, grew uninterruptedly between 1980 and 2010, with brief declines during the recession years (1983, 1986,

1995, 2009), the wages/GDP ratio had the opposite effect, falling from 43% in 1981 to 28% in 2010 (right axis, solid line)

Figure 3: Absolute GNP (bars, left axis, 1993 pesos) and remuneration/GNP proportion (line, right axis, %)

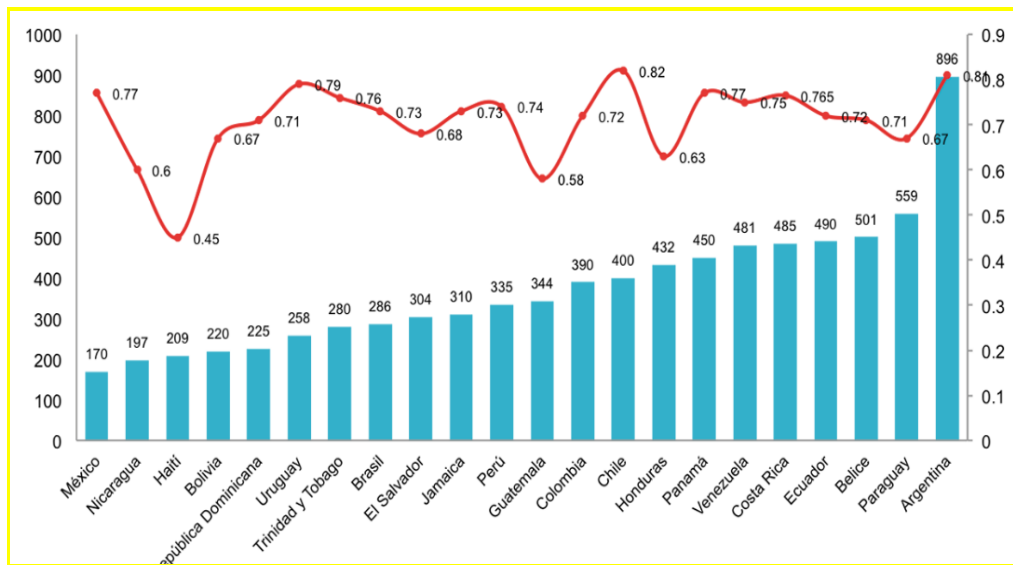


Source: Based on INEGI (2025a)

Regarding Latin America, despite Mexico being the country with the highest level of industrialization in the region, the second largest economy after Brazil, and one of those with the

highest level of human development (behind only Chile, Argentina, and Uruguay), its monthly minimum wage was the lowest in the region in 2013, as confirmed in Figure 3

Figure 3: Monthly minimum wage in purchasing power parity dollars (bars, left axis) and human development index (line right axis) in Latin America and the Caribbean



Source: UIA-P (2014) and UNDP (2014).

On August 5 and 6, 2014, the International Forum on Minimum Wages, Employment, Inequality, and Economic Growth was held in a large and fully occupied auditorium in Mexico City. The prominent organizers were the Economic Commission for Latin America and the Caribbean (ECLAC), the Faculty of Economics of the Autonomous National University of Mexico (UNAM), and the Mexico City government. The essence of the organizers' proposal is reflected in Figure 4, which shows that to achieve the

minimum food and non-food well-being for an individual (not even for a family, as established by Article 123 of the Constitution), a 24.19% increase in the minimum wage was required in 2015 in the then geographic area A (today there is a single minimum wage level for the entire country), which is indicated on the right axis. The absolute values of the minimum wage and well-being are indicated on the left axis

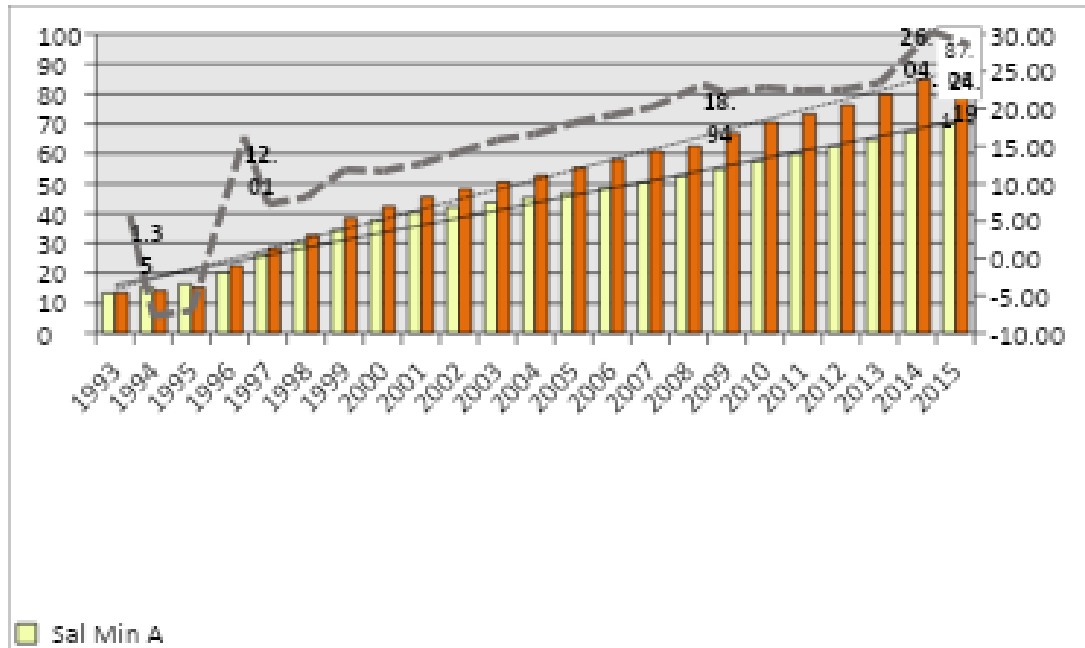


Figure 4: Minimum wage paid in geographical area A vs. the threshold urban well-being income, both in daily pesos (bars, left axis) and the amount of wages required to cover the needs of the threshold urban well-being (dotted line).

Source: Based on CONEVAL (2022) and CONASAMI (2025)

During the International Forum various national and international analysts and researchers, as well as the City of Mexico government officials, highlighted the exceptional problems that the minimum wage had at that moment, listing them as follows:

- It did not comply with Section VI of Article 123 of the Constitution, as it did not serve to "satisfy the normal needs of a head of household, in the material, social, and cultural spheres, and to provide for the compulsory education of children".
- It falls substantially below the minimum wages for food and non-food welfare.
- It was not set based on the absolute or relative productivity of the worker, but rather

served as a mechanism to control inflation.

- It was the lowest of all Latin American countries, even though Mexico was the second-largest economy in the region.
- It was not being used as an instrument to reduce inequality, boost the domestic market, and stimulate productivity, and
- It was erroneously linked as a unit of account to various payment obligations (GCDMX, 2014).

Given this, both during the seminar and afterwards, federal government officials, employer leaders, worker representatives before tripartite bodies, and the Governor of Bank of Mexico (BANXICO) expressed their rejection of a salary

increase higher than the historical level for 2015 and increases higher than inflation in subsequent years, given their effects on price formation, competitiveness, and macroeconomic equilibrium, in addition to the risk of the issue becoming politicized. As a corollary, they established in the final section of a tripartite document promoted by the Secretariat of Labor and Social Prevision (STPS): "We commit our efforts and responsible participation so that, through Social Dialogue, the changes we are implementing in Mexico translate into greater competitiveness, generate sustained economic growth, and materialize into tangible benefits for all Mexicans (STPS, 2014).

On November 25, 2014, the Mexico City Legislative Assembly approved the ruling creating the Mexico City Unit of Account, which took effect on January 1, 2015. It was set at \$69.91 pesos per day (p/d). Days later, on December 5, 2014, the Head of Government appeared before the CONASAMI Council of Representatives to present his proposal for leveling the minimum wage, arguing the need to increase it to \$82.86 p/d as of January 1, 2015, and then increase it to \$171.31 p/d between that year and 2018, in line with doubling the CONEVAL welfare line (assuming families with two members). Subsequently, it was proposed to formalize the employment of 18,353 women and 15,016 men who worked for Mexico City's government. Likewise, the Mexico City Legislative Assembly should approve the concept of a responsible wage provider. This implied that the Mexico City government would only contract services from companies that paid their workers at least the minimum wage of \$82.86.

The representatives of the productive sectors, convened by the STPS, agreed to discuss the minimum wage, within the legal framework; but they declined to "increase it by decree," and conditioned the increase on the evolution of productivity. They also stated that wages in general would rise thanks to the structural reforms. Additionally, they ruled that minimum wages are solely the responsibility of the federal government. Current legal provisions establish, as specified, that the body empowered to review and set the minimum wage is the CONASAMI Council of Representatives, which is composed of 11 labor representatives, 11 employer representatives, and one government representative, who is the president of the Commission (STPS, 2014).

On August 28, 2014, the National Conference of Labor Secretaries, belonging to the National Conference of Governors, declared itself in favor of finding responsible mechanisms that would contribute to improving the income of all Mexicans and combating informality, recalling that in March 2014, a proposal was presented to the Executive Branch to disassociate the minimum wage as a unit of account in more than 871 articles of 149 federal laws. This would facilitate the recovery of their purchasing power. They stated that the Sectoral Labor Program, published on December 13, 2013, incorporated strategies and lines of action to improve workers' income, including promoting the recovery of wage purchasing power linked to increased productivity, advancing the recovery of the minimum wage's purchasing power, establishing a single general minimum wage in the country, and decoupling the minimum wage from legislation (CONAST, 2014).

On October 3, 2014, the Official Gazette of the Federation published the Resolution of the Honorable Council of Representatives of the National Minimum Wage Commission, creating the Advisory Commission for the Gradual and Sustained Recovery of General and Professional Minimum Wages. The Advisory Commission urged the completion of the work promoted by the Council of Representatives in December 2011 to conduct studies on the feasibility of decoupling the minimum wage from various legal provisions as a unit of account, base, or reference measure. It also recalled the need for local, state, and municipal legislation to decouple the minimum wage from these provisions to avoid unintended effects (DOF, 2014).

Furthermore, the Advisory Commission should promote the preparation of studies analyzing the impact of potential increases in the minimum wage on inflation, employment, productivity, wage dispersion, poverty, and business sustainability, among other variables. In this regard, it should consider the prevalence of the informal sector in the country's economy, the size of the establishments where these workers work, and their job qualifications. Likewise, the budget essential for meeting the needs of families where a salaried worker receives a minimum wage should be measured, in terms of material, social, and cultural needs, as well as those related to children's education; and the living and working conditions of salaried workers receiving a minimum wage should be studied (DOF, 2014).

Furthermore, the Commission would carry out the following actions: analyze the feasibility of establishing a single general minimum wage throughout Mexico and define the strategy and timeline for its implementation; determine the strategy to dissipate the effect of the increase in minimum wage as a benchmark in collective bargaining agreements, in order to use it as an independent policy instrument for the benefit of workers who receive it; and review and define, where appropriate, the criteria for increasing professional minimum wages when general minimum wages are revised or set (DOF, 2014). The Commission's work was supposed to be completed within a maximum of six months from its establishment, which took place on October 24, 2014. However, the Advisory Group was established two months later, which constituted an initial delay in progress.

For its part, the National Action Party (PAN) proposed submitting the following question to a referendum: "Do you agree that the Federal Labor Law should establish that CONASAMI should set a new minimum wage that covers all the needs of a family to guarantee at least the welfare threshold determined by CONEVAL?" The reporting Justice at the Supreme Court of Justice of the Nation, José Ramón Cossío, rephrased the question, for the sake of clarity and simplicity, as follows: "Do you agree that a new minimum wage should be established, sufficient for a family to acquire the goods and services required to cover its food and non-food needs?"

Given this situation, Minister Olga Sánchez Cordero stated that: As the question is posed, the intention is for CONASAMI to necessarily adopt the so-called "welfare line" factor, determined by CONEVAL. Therefore, we are faced with a popular consultation that seeks to have legislative effects, and not the establishment by the competent authorities of a new minimum wage. For her part, Minister Margarita Luna Ramos argued: "...There is a contradiction between the provisions of Article 123, because even though it is being determined that the minimum wage will be established by CONASAMI, the truth is that the second paragraph of Article 123 is practically being replaced, for the reasons given by CONEVAL and the parameters established for its determination. The referendum cannot establish situations or parameters that contradict what is already established by the Constitution and, in any case, the only way to reform the Constitution is through Congress."

For his part, in the spot prior to President Peña Nieto's Third State of the Nation address on December 10, 2015, the Executive branch explained the reasons for slow economic growth, which he claimed were corruption, inequality, and the complicated international economic situation. Contradictorily, the Ministry of the Interior did not mention the minimum wage as an indispensable mechanism for correcting inequality, and the familiar strategy of combating poverty through Prospera and the National Crusade Against Hunger continued. Nor was there any mention of the problem of the San Quintín day laborers in the municipality of Ensenada, Baja California. At the time, they were requesting a daily minimum wage of 200 pesos, a negotiation involving the Ministry of the Interior and the STPS.

On December 5, 2014, the Chamber of Deputies received the presidential proposal to separate the minimum wage from fines and administrative sanctions and to create the Updated Unit of Measure (UMA), which will be equivalent to the current general minimum wage for geographic area A, or whatever replaced it at the time the law came into effect. The INEGI was empowered to establish the value of this unit, applying a procedure based on the National Consumer Price Index (INPC). A period of one year, starting from the date the reform came into effect, was granted for the competent federal, Mexico City, state, and municipal authorities to make the appropriate adjustments to the laws and regulations under their jurisdiction. In October 2015, the standardization of Geographic Areas A and B was completed, with a cumulative increase of 5.5% for Area B and none for Area A.

On December 26, 2015, Congress approved the proposal to separate the Minimum Wage from other legal and administrative regulations and determined that an analysis would be conducted during its 2016 regular session to achieve a living wage in Mexico. To this end, the Finance, Labor, Competitiveness, and Social Security Committees would coordinate and identify initiatives presented on the topic. With the creation of the Technical Council responsible for regulating and directing the pre-reporting phase of initiatives related to the minimum wage, the guiding principles of a national discussion platform would be defined to generate a broad, inclusive, and informed debate. This body would be composed of the chairs of these committees and a representative from the Senate and the Ministries of Finance, Labor, and Economy.

Likewise, IMSS, the Institute of Social Security and Services for State Workers (ISSSTE), CONASAMI, and CONEVAL. Also, present were the Center for Public Finance Studies of the Chamber of Deputies, the OECD, the Legal Research Institute of UNAM, the Center for Economic Research and Teaching, the Employers' Confederation of the Mexican Republic, the Business Coordinating Council, and the Confederation of Industrial Chambers, as well as unions and five academics of national prestige.

On January 27, 2016, the reform to Articles 26 and 41 of the Constitution regarding the de-indexing of the minimum wage was consolidated. Its most relevant elements are:

i. The minimum wage may not be used as an index, unit, base, measure, or reference for purposes unrelated to its nature.

ii. All references to the minimum wage as a unit of account, index, base, measure, or reference to determine the number of obligations and assumptions provided for in federal, state, and Federal District/City of Mexico laws, as well as in any legal provision emanating from all the above, shall be understood to refer to the UMA.

iii. INEGI shall calculate, in the terms established by law, the value of the UMA, which will be used as a unit of account, index, base, measure, or reference to determine the amount of payment for obligations and assumptions provided for in federal, state, and Federal District/City of Mexico laws, as well as in legal provisions emanating from all of the above (DOF, 2016).

The Congress of the Union should issue the regulatory legislation to determine the value of the UMA, within a period not exceeding 120 calendar days following the publication of the reform, and the Congress of the Union, the State Legislatures, the Legislative Assembly of the Federal District/CDMX, as well as the Federal, State, Federal District/CDMX and Municipal Public Administrations should make the corresponding adjustments to the laws and regulations under their jurisdiction, as appropriate, within a maximum period of one year from the entry into force of the Decree, in order to eliminate references to the Minimum wage as a unit of account, index, base, measure or reference and replace them with those relating to the UMA. Regarding the determination of the UMA value, information should be provided on the promulgation of the Decree that defined the methodology for its calculation and, briefly, on the

work of the Technical Council responsible for regulating and directing the pre-determination phase of the initiative related to the minimum wage, created by the Political Coordination Board of the Chamber of Deputies. Furthermore, the importance of the National Commission for the Gradual and Sustained Recovery of General and Professional Minimum Wages disclosing the results of the studies it began in 2014 was recalled, specifically: Minimum wage and employment; Minimum wage and productivity; Minimum wage and inflation; Minimum wage and poverty level; Beacon effect of the minimum wage; Formality/informality; Minimum wage and business competitiveness, and Living conditions of families dependent on a minimum wage.

It is evident that the list did not consider, despite being very important, a calculation of the equilibrium wage, since for many years there had been a presumption that the minimum wage did not even reach the level at which the labor supply and demand curves intersect, and another on minimum wage and globalization, since Mexico's strategy for inserting itself into international trade since the 1980s had been through very low wage levels.

In the days leading up to the 1st May Day celebrations in 2016, the Secretary of the STPS stated that there would be no spectacular announcements by the President at the official ceremony since, in the almost three years of his six-year term, 1.8 million jobs had been created, productivity had increased, real wages had risen, and the unemployment rate was very low. At the official celebration, representatives of employers and workers joined in, and the President of the Republic delivered a laudatory speech to them, but without any commitment on wages.

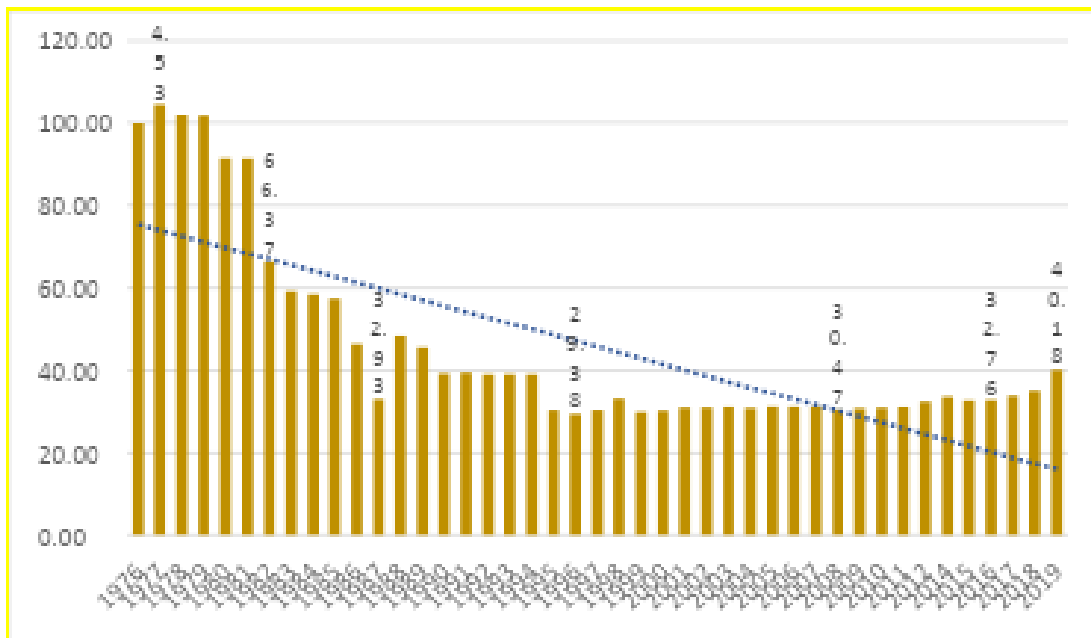
To everyone's surprise, in December 2016, the CONASAMI Council of Representatives approved a 9.5% increase in the minimum wage for 2017, of which 4% was conventional, in line with the inflation expected by the SHCP for the following year, and the remainder was granted as a one-time compensation of \$4.00. This would bring the minimum wage in effect in 2017 to MP \$80.04. The increase was approximately 13% short of meeting the minimum food and non-food welfare requirements established by CONEVAL for people living in urban areas. Surprisingly, the increase proposal was made by the Employers' Confederation of the Mexican Republic (CTRM), and the Council of Representatives accepted it without

waiting for any opinions from the group of experts created in Congress to analyze the minimum wage. It also ignored the studies conducted by CONASAMI itself, several of which opposed increasing the minimum wage due to alleged adverse effects on inflation, employment, productivity, informality, and other variables. So, in practice, both bodies were overwhelmed by social pressure. This was a lesson for future salary determinations, for the operational mechanics of CONASAMI, and for any possible involvement by the Legislative Branch.

The next significant adjustment to the minimum wage occurred in December 2018, once the new six-year administration took office and the

presidency of CONASAMI changed, after having been presided over for more than 25 years by the same person, a staunch defender of institutionalism. The adjustment, once again proposed by employers and supported by workers, was 16.2% nationwide and covered one person's food and non-food needs at that time, according to CONEVAL (102.68 p/d), and doubled in the northern border area (municipalities located up to 25 kilometers from the US border). This consolidated the trend toward the recovery of this constitutional provision, as shown in Figure 5: between 2008, the year of the lowest level in the last 10 years, and 2019, the year with the highest increase, there was a difference of 32%.

Figure 5: Real value of the general minimum wage in 1976. Constant pesos



Source: CONASAMI (2025)

The increase in the minimum wage between 2012 and 2018 relieved enormous social pressure and opened the possibility that in the future, workers' purchasing power would not only be restored, as established by law since the 1987 Economic Solidarity Pact, through official calculations of expected inflation for the following year, but also based on the cost of the food and non-food basket determined by CONEVAL or an alternative institution with sufficient credibility. This is constitutionally correct and sends a signal that the tripartite system should not fall into complacency or the pursuit of international competitiveness for the Mexican economy through

low wages. From then on the key task has been to adhere again to the constitutional maxim that "general minimum wages must be sufficient to satisfy the normal material, social, and cultural needs of a head of household, and to promote the compulsory education of children."

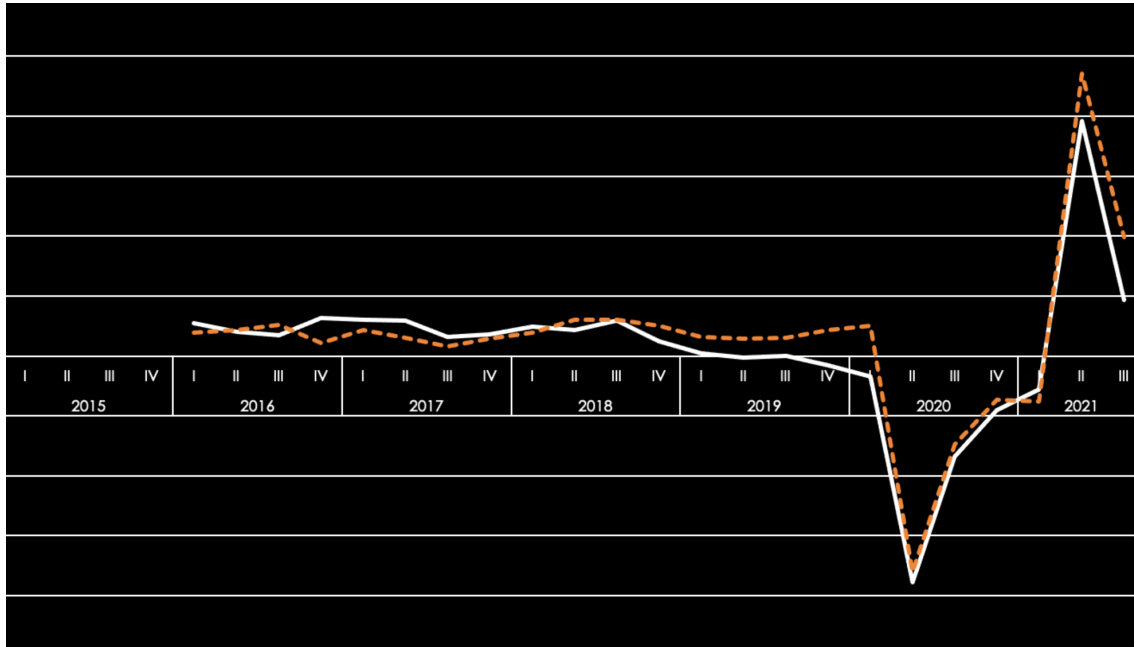
IV. HOW EFFECTIVELY SIGNS DOES THE LABOR MARKET SEND?

Given the fact that 6 out of every 10 jobs created in Mexico are informal, it is tempting to believe that the labor market does operate too far from the way it does in developed economies, and

even that wages are decided arbitrarily. There are plenty of ways to prove the contrary. To begin with, as established by the logic of economics and confirmed by Figure 6, there is a positive

relationship between the evolution of the product and the creation of jobs of all kind at the national level between 2015 and 2021.

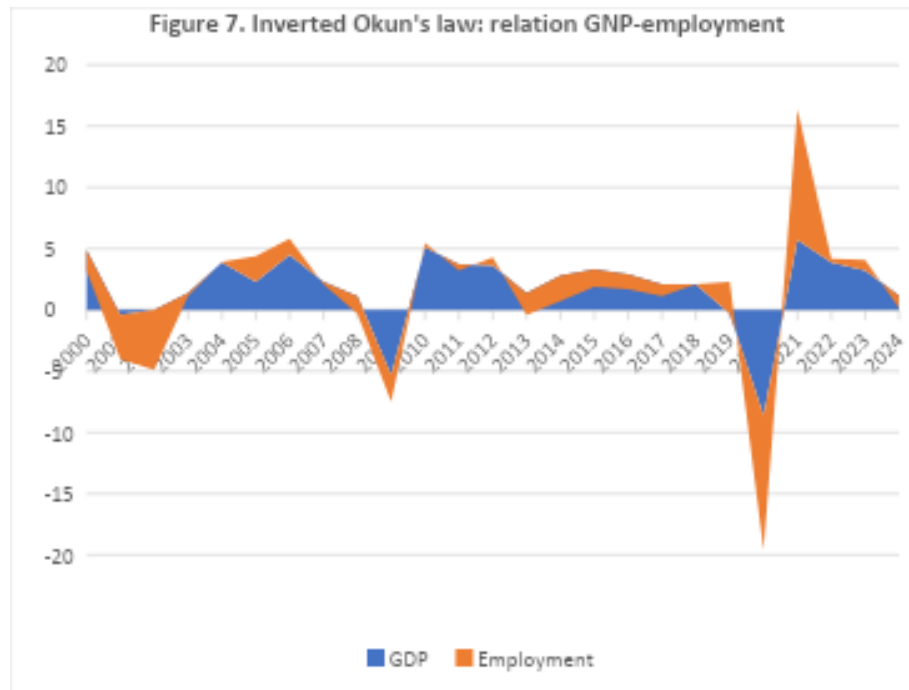
Figure 6: Relation between the GNP (constant line) and the job creation variations Annual changes (%)



Sources: INEGI (2025a) and STPS (2025)

The positive relationship between economic growth and employment led economist Arthur M. Okun (1962) to observe that there is an inverse relationship between economic growth and unemployment. He suggested that for the unemployment rate of the US to be reduced in a non-full employment situation during the post-war years, a constant rate of growth of GNP was required at 3% to reduce unemployment by 1%. If Mexico's expected positive relationship between

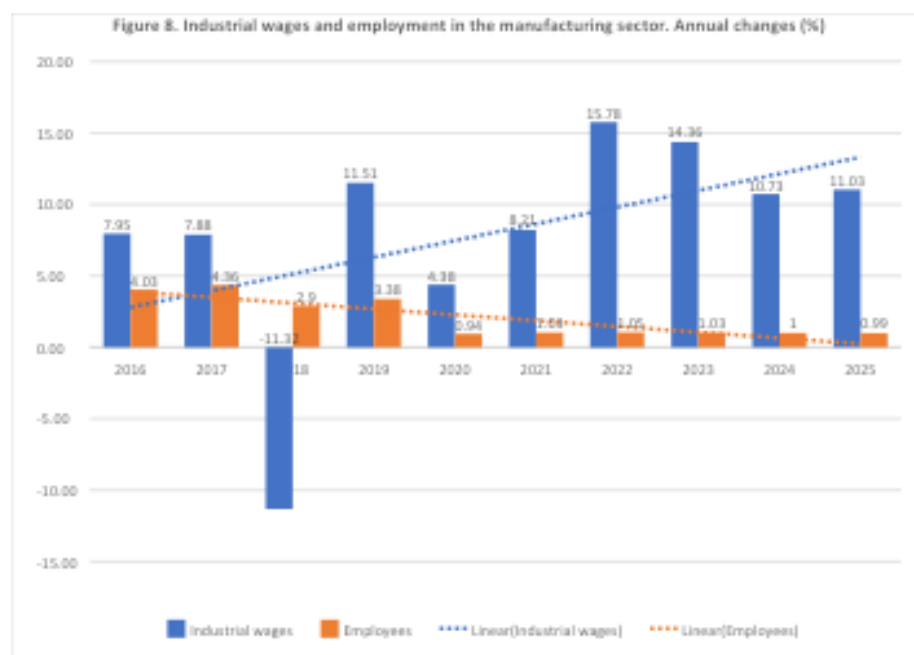
employment and economic growth is analyzed from 2000 to 2025, we arrive at the relation shown in Figure 7. As deduced from it, each percentage point increase of GDP promotes an increase of 1.37 in labor force participation (a more accurate measure of employment in Mexico than the rate of employment, as it reflects the willingness of people to enter and exit the labor market), with a Pearson correlation coefficient equal to 0.686020



Source: INEGI (2025a) and STPS (2025)

In the same way, when labor unions in the manufacturing sector, which is one of the most unionized in Mexico, negotiate excessively high wage increases, the employment of new workers tends to increase at a slower rate. This is a medium-term trend that may not be as

pronounced in the short run, and confirms that, as expected in competitive markets, demand has a negative relationship with price. Figure 8 corroborates this with the slopes of both variables and the Pearson correlation coefficient value of -0.29522 .



Source: STPS (2025)

When economic growth becomes high and exerts pressure on prices (particularly if the economy is approaching full employment), central banks cool it by increasing the most important instrument they have at their disposal: the interest rate. This, in turn, reduces the demand for labor, as observed by A. W. Phillips (1958), using the unemployment rate as a proxy variable; thus, a

negative relationship is established between both variables. The same is true for Mexico if we consider the period 2000–2024, with the unemployment rate on the horizontal axis and the interest rate on the vertical axis, as shown in Figure 9. In this long-term perspective, the Pearson correlation coefficient has a value of -0.424591 .



Sources: INEGI (2024a) and STPS (2025)

V. DID THE MINIMUM WAGE INCREASES AVOID THE LABOR MARKET DISTORTIONS?

The fourfold increase in the minimum wage from 2015 to 2025 did not effectively resolve the deficiencies in other labor market factors; instead, it somewhat worsened them. This issue will be discussed in the following pages.

4.1 Reconfiguration of the labor market structure

To analyze the evolution of labor statistics in Mexico from the end of 2018 to the end of 2024, considering it as a dynamic market for all age groups, one can examine the accumulated differences. These differences reveal that the total population increased by 6.32 million (Table 1, row 1). Additionally, over 9 million individuals turned 15 years old and became eligible to join the labor force (row 2). Since the number of upper secondary and higher education students remained at 9.2 million in

2024, the same figure registered in 2018, as reported by the Secretariat of Education (SEP), all 9 million individuals who turned 15 years old during the period should be expected to join the labor market either as formal or informal workers. However, during surveys conducted by ENOE personnel, only 5.5 million of new-entrants to the labor market identified themselves as part of the Active Labor Force Population (row 3), while the remaining 3.5 million were classified as Non-Active Labor Force Population (row 5). This latter group's size is concerning, indicating that there was insufficient space in the market both formal and informal for them. Rather than being unemployed, they reported that they were not actively seeking employment, despite their need for a job.

On the other hand, the system reported the creation of 5.8 million new jobs during the six-year term (row 7). However, it is unclear how these jobs were absorbed into the labor market. When broken

down into IMSS formal workers (row 11), Other formally registered workers (mainly government positions, row 12), and Informal workers, or occupations (row 13), there are discrepancies in the figures. The number of Other formally registered workers increased by 1.8 million during the period, with an annual growth rate of 7.4%, the highest in the last column, except for Minimum wages (20.8%). However, as reported by the state social security system (ISSSTE), government workers, both federal and state, totaled 3.98 million in 2018 (690 thousand less than indicated in column 1, row 12) and rose to 4.03 million in 2024, one million less than the 5.07 million reported by the ENOE (column 2, row 12). Explaining the accommodation of between 1.04 and 1.73 million workers seems challenging. These movements largely account for why the labor force participation rate, which measures the relationship between individuals who declare themselves as part of the labor market, either employed or not, over those aged 15 and above, does not exceed 60% during the period (row

14), one of the lowest figures among the countries belonging to the Organization for Economic Cooperation and Development (OECD). Additionally, the informal labor rate remained between 54% and 57% during the period and continues to grow. The figures are quite concerning.

As measured in Mexico, the rate of unemployment is a low accurate measure of the pressures the labor market faces, as it masks many problems in the process of accommodation of active vs. non-active workers and formal vs. informal workers. To address this issue, Table 1 introduces an alternative measure called the Effective Labor Pressure Rate (row 19), which combines the Critical Occupations Conditions Rate with the Rate of Non-Active Available Labor Force (discouraged workers). This in relation to the Economically Active Population. As indicated in columns 2 and 3 of that row, the percentage increased from 25.51% at the end of 2028 to 40.04% at the end of 2024

Percentage increased from 25.51% at the end of 2028 to 40.04% at the end of 2024.Sources: STPS (2025) and INEGI (2025a)

Table 1: Labor force statistics 2018–2024. Absolute values and average changes

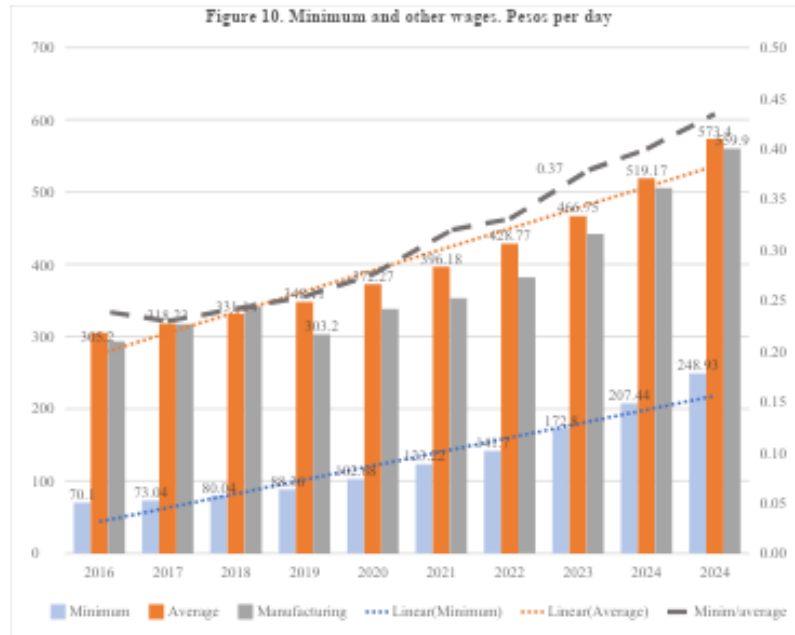
December 2018–December 2024

Indicator	2018	2024	Absolute change 2024–2018	Annual Average rate (%)
1.Total population	123,975,965	130,294,079	6,318,114	0.83
2. 15 years+ population	92,874,427	101,936,513	9,062,086	1.56
3.Active labor force	55,519,394	61,055,321	5,535,927	1.6
4.Unemployed people	1,813,522	1,567,775	–245,747	–2.4
5.No active labor force	37,355,033	40,881,192	3,526,159	1.52
6. No actives wishing to have a job	5,731,676	5,482,356	–249,320	0.74
7. Total occupation	53,705,872	59,487,546	5,781,674	1.72
8. Secondary sector occupation	13,812,920	14,666,862	853,942	1.01
9. Of which Manufacturing occupation	9,073,626	9,660,257	586,631	1.05
10. Tertiary sector occupation	32,901,106	38,151,939	5,250,833	2.5
11. IMSS registered workers (formal)	20,077,365	22,024,386	1,947,021	1.55
12. Other formally registered workers	3,292,091	5,072,156	1,780,065	7.4

13. Informal occupation	30,336,416	32,391,004	2,054,588	1.11
Wages				
14. Remunerated IMSS registered workers	4,463	7,438	2,976	8.9
15. General minimum wage (GMW)	80	249	169	20.8
Coefficients				
16. Labor force participation rate	59.8	59.9	0.1	0.03
17. Workers receiving from nothing to 1 GMW (% of labor force)	51.52	66.46	14.94	4.34
18. Unoccupation rate	3.27	2.57	0.7	-3.93
19. Partial occupation and unocupación rate (TOPD)	9.08	9.16	0.08	1.54
20. Critical occupation conditions rate (TCCO)	15.18	31.07	15.89	12.68
21. Effective labor pressure rate [(TCCO+PNEAD)/PEA]	25.51	40.04	14.53	7.8
22. Labor informality rate	56.49	54.45	-2.04	-0.60
23. GDP 2018 millon pesos	24,605,276	25,780,946	1,175,670	0.78
24. Per cápita GDP 2018 millon pesos	198,468.10	197,867.40	-600.7	-0.05

4.2 The influence of the minimum wages on other types of wages

The average wages in the private sector, which are based on a large, diversified and dynamic database of workers registered with IMSS, serve as a key indicator of formal worker remuneration in Mexico. These wages are determined through negotiations between employers and labor unions. From 2018 to 2024, the average private sector wages doubled in daily Mexican peso terms, while its component of manufacturing wages increased by 2.2 times, as illustrated in Figure 10. Furthermore, Table 1, rows 14 and 15, show that the minimum wage grew at an average annual rate of 20.8%, whereas wages of IMSS-registered workers increased by 8.9%. This data suggests that there was no "faro" effect, contrary to what has been suggested in various official and academic circles. It is also important to note that inflation rose significantly during this six-year period, with an average annual growth rate of 5.2%, higher than the 4.2% recorded from 2000 to 2018.

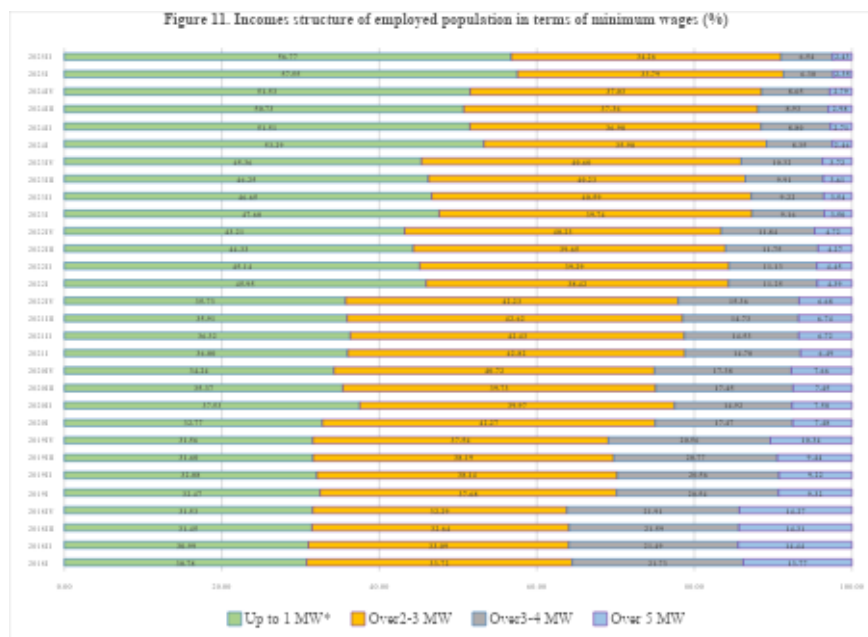


Sources: CONASAMI (2025) and STPS (2025)

4.3 Significant rise in the proportion of minimum wage workers compared to the overall workforce

In the first quarter of 2018, 30.78% of all employees were earning from zero (0) to 1 minimum wage, including some unspecified workers who are usually the lowest paid. By the second quarter of 2025, this percentage had risen to 56.77%, almost doubling. On the other hand, the percentage of employees earning 4 or more minimum wages

decreased from 35.5% to 8.97%, an impressive -75% in absolute terms. The last figure is not ideal for societal advancement, as people's aspiration should be to push the less paid to the top but not necessarily bring down those in better condition to lower levels. Meanwhile, the percentage of those earning between 2.01 and 3.00 minimum wages remained stable at around 34%, as shown in Figure 1

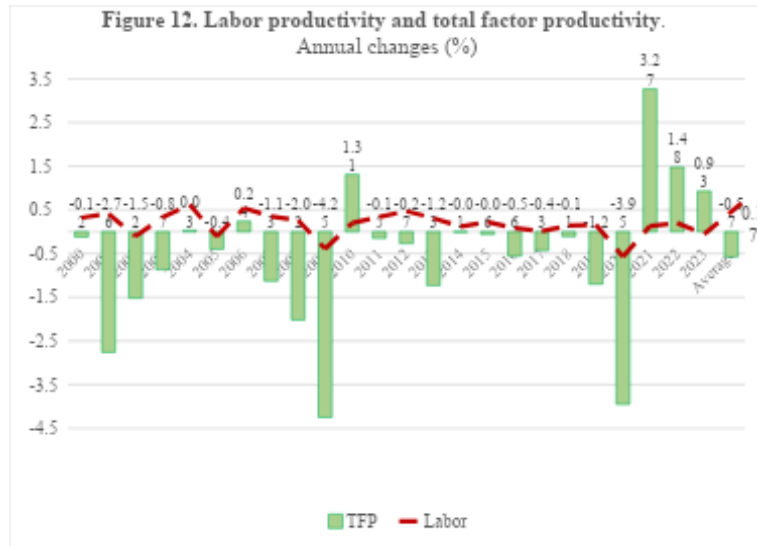


Source: STPS (2025)

4.4 Poor productivity performance

During the recession years after 2000, both labor productivity and Total Factor Productivity (TFP) faced significant challenges. However, TFP, which includes the productivity of capital, labor, energy, manufacturing, and services (KLEMS

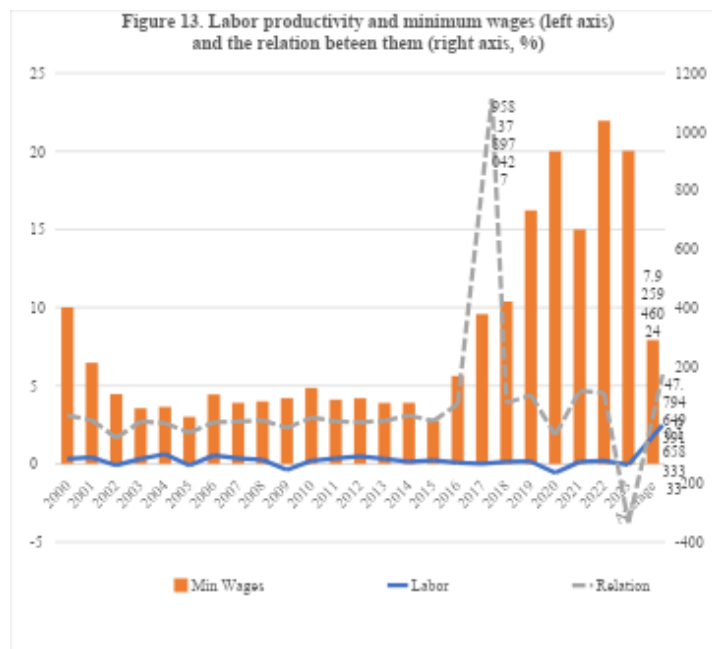
method), showed more variability, with values ranging from -4.25 in 2009 to 3.27 in 2021 and an average of -0.57 during 2000–2023. In contrast, labor productivity fluctuated from 0.62 in 2004 to -0.56 in 2020, with an average value of 0.17 over the 24-year period, as shown in Figure 12



Source: INEGI (2024b)

Between 2000 and 2023, the minimum wage increases exceeded labor productivity by an average of 47.8 times, as shown in Figure 13. Specifically, while the minimum wage rose by 7.93%, labor productivity only increased by 0.1659%. In 2000, the minimum wage was the lowest in

continental Latin America, but the adjustments between 2016–2025 allowed it to become one of the highest in Latin America without significantly impacting both inflation and the demand for labor. However, this may not be the case for the future

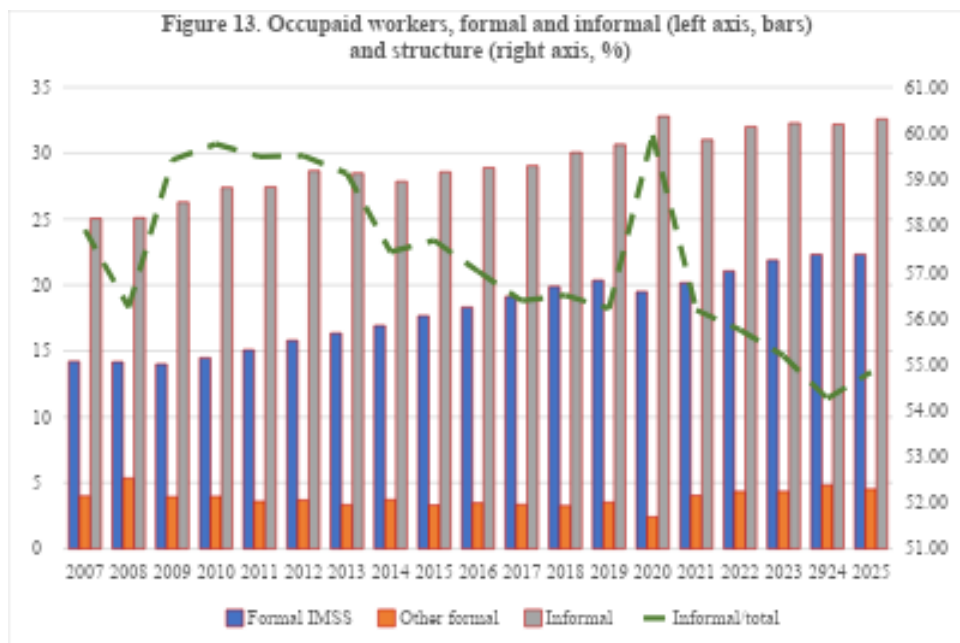


Sources: INEGI (2024b) and CONASAMI (2025)

The increase in the tertiary sector's share of total employment from 61.3% in 2018 to 64.1% in 2024, resulting in the creation of 5.8 million new jobs, indicates a trend in Mexico where lower-productivity jobs are growing at a faster rate than higher-productivity ones. (Most informal activities are linked to small commerce and services in Mexico). This growth is particularly evident in the Manufacturing industry, a part of the Secondary sector, which only added 586 thousand new jobs and saw its share decrease from 19.9% in 2018 to 16.3% in 2024 (Table 1, column one, row 9).

4.5 Slight reduction of informality

Many programs to reduce informality have been established by the federal government since the beginning of the 21st century. They have been based on tax exemptions, facilities to pay past taxes, facilities to pay workers' social security, and stimulus to integrate their pension funds. However, they have yielded slight results. As shown in Figure 13, except for 2020, the year with the highest impact of the COVID-19 pandemic on economic activity, the participation of informal workers in the total number of employed workers kept falling from a peak in 2010 of almost 60% to almost 54% at the end of 2024. The trend reversed to almost 55% by mid-2025, and it is expected to continue if the economy does not improve.



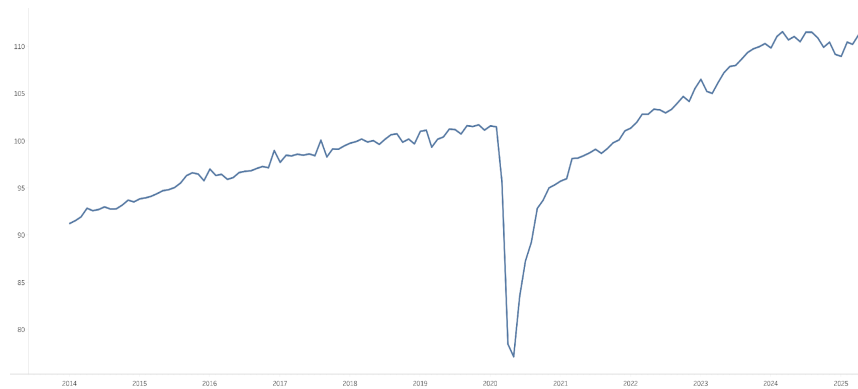
Sources: INEGI (2025a) and IMSS (2025)

4.6 Consumption push has not had a clear response

Since 2019, Mexican authorities have been stimulating the consumption of goods and services by the lowest deciles of income distribution through increases in the minimum wage, which have already been analyzed, and cash transfers in the form of social programs equivalent to 2% of 2025's GDP. This has led to a reallocation of resources to address short-term needs, but it has also reduced investment and the capacity of the economy to grow. In general, the government will allocate 10% of

the 2026 federal budget to social programs and 9% to investment (2.4% in relation to GDP, the lowest level in decades). Despite this push for private consumption, such a variable has not had a sufficient impact on aggregate demand: it decreased from 52.3% in the first quarter of 2024 to 49.3% in the same period in 2025. In this sense, the Prompt Index of Private Consumption, based on 2018=100, reached its highest level in March 2024 at 111.55 and fell to 110.06 in May 2025 (-1.3%), as shown in Figure 14.

Figure 14: Monthly Indicator of Private Consumption in the Domestic Market (MIPCDM)

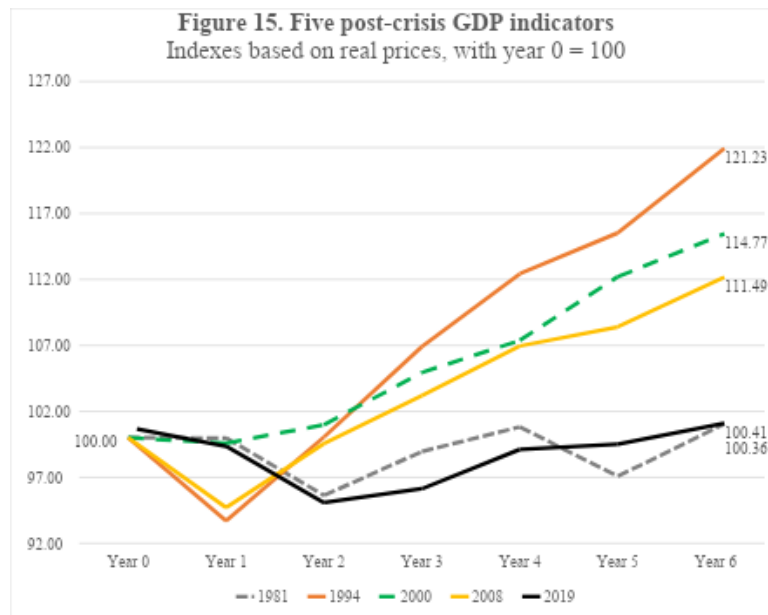


Source: INEGI (2025a)

VI. RESULTS AND DISCUSSION

Despite the increase in minimum wages since 2016, many positive outcomes in the labor market have yet to be seen. When analyzing the economy, including the labor market, from a medium-term perspective, the supposed positive results observed by authorities and some academics at the end of 2021 and the beginning of 2022 appear to be overly optimistic. The recovery of the GDP after the COVID-19 economic crisis took a longer time compared to previous crises. Figure 15 shows

that the worst ones in terms of the time needed for the economy to recover to pre-crisis levels were those of 1982 and 2020, taking six years. In contrast, the recovery in other crises (1995, 2001, and 2008) occurred within a year, with the index reaching between 111.49 (a 1.9% average annual rate of growth) for the 2008 crisis and 121.23 (a 3.5% average annual rate of growth) for the 1995 crisis in a period of six years. However, in the 1982 and 2020 crises, the indexes just went over the value of 100 after six years (a 0.8% average annual rate of growth).



Sources: Based on INEGI (2025a)

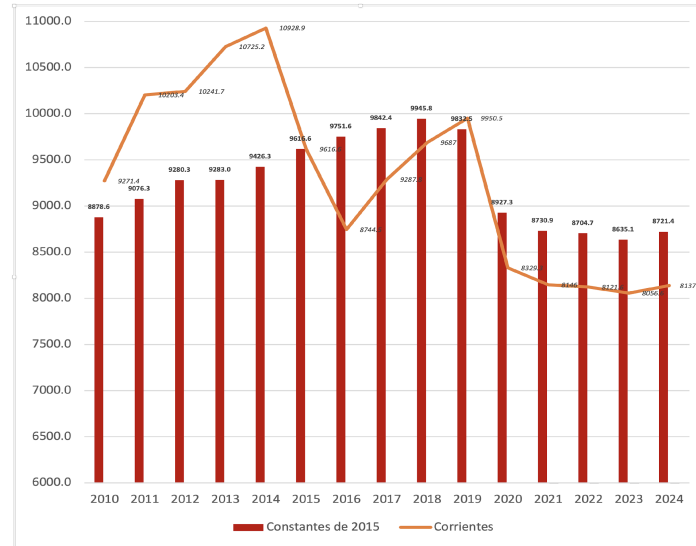
If we consider the per capita GDP in addition to the GDP, it is evident that at market prices, it began to decline in 2015 (line, Figure 16) and at

constant prices decreased consistently from 2018 to 2024 (bars, Figure 16). Throughout this period, the GDP experienced a weak annual average growth

of 0.78%, which was lower than the growth rate of the total population (0.83%), resulting in a decrease

of -0.05% in per capita GDP. Consequently, in terms of production the population became poorer.

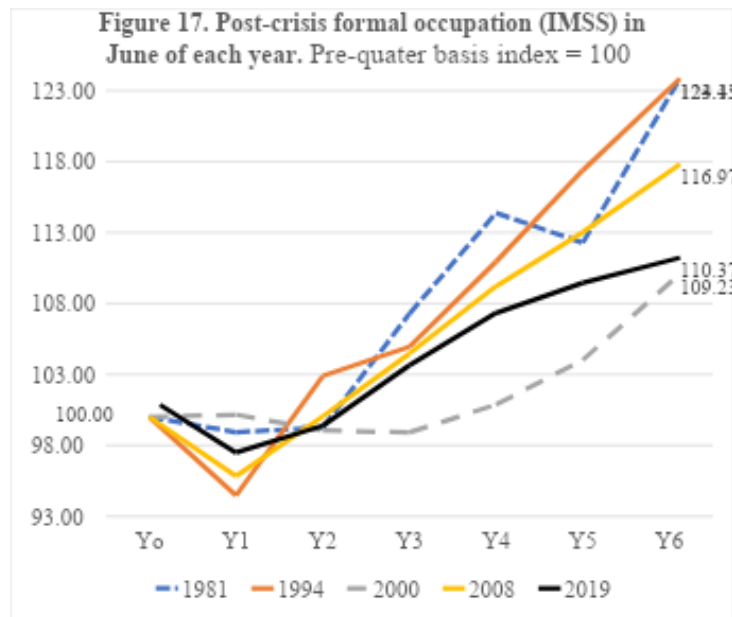
Figure 16: GDP at market and constant 2015 prices 2010–2024, Thousand million pesos



Source: INEGI (2025a)

The performance of both GDP and per capita GDP affected the hiring of the formal labor force in the quarter following all crises, except for the 2001 one, which was weaker and slower in terms of formal jobs recovery, as shown in Figure 17. Excluding it, the medium-term recovery from all

crises has been slower in the 2020 one: after six years, the formal labor index grew by 10.37%, with an annual average of 1.7%. For comparison, during the 1994 crisis, the accumulated growth of hiring was 24.45% and the annual growth reached 4.07%



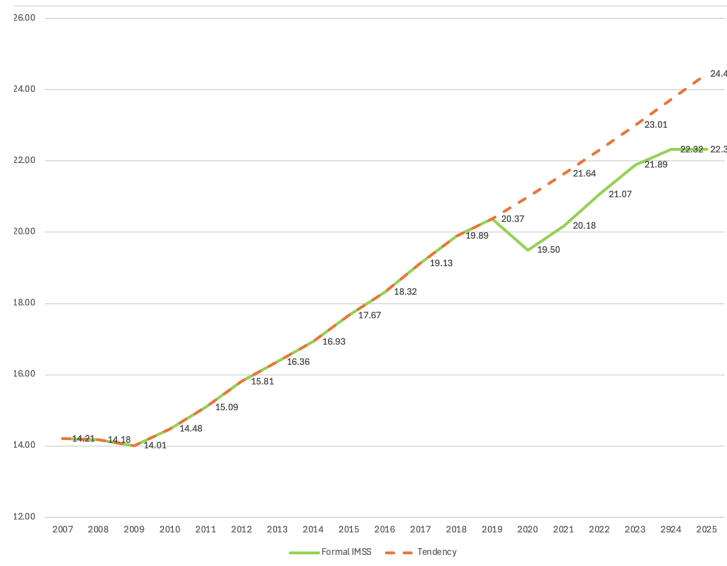
Source: IMSS (2025)

If the trend of formal job creation associated with IMSS during the pre-crisis period from 2009 to

2019 is projected to 2024, there is a difference of 2 million jobs by the year 2024 (Figure 18). This

indicates a decline in the economy's ability to generate such jobs. As a result, the informal economy had to absorb a larger number of workers

over a six-year period, and labor productivity advanced at one of the slowest rates since that metric was established.

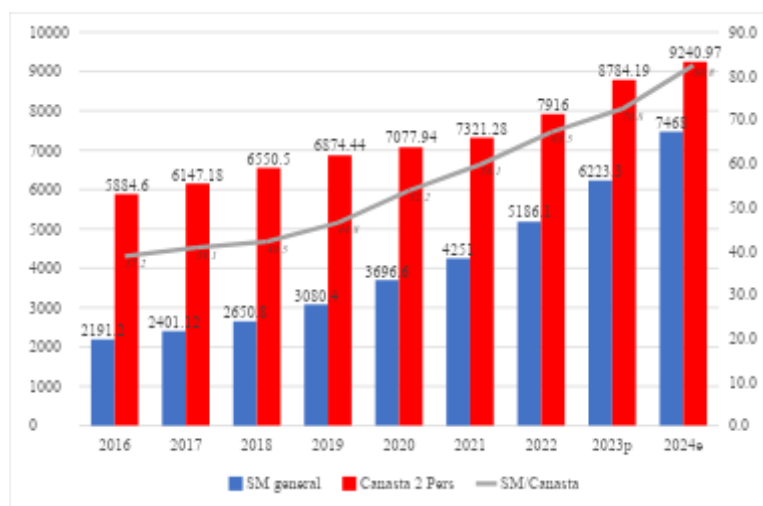


Source: IMSS (2025)

The six-year effort was not sufficient to achieve the goal set by the federal government in December 2018. The goal was for each family, headed by an average of two people, to be able to purchase two welfare baskets with the amount of one minimum wage. These baskets consist of food and non-food goods and services, based on

minimum requirements per person and their prices calculated by CONEVAL (2023). As shown in Figure 19, the minimum wage (SM) in 2018 could only afford 40.5% of these baskets, but by the end of 2024, it reached 80.8% of them. This resulted in a 19% shortfall compared to the goal set in 2018.

Figure 19: The General minimum wage as compared with the food and non-food basket cost per month for two persons in current pesos, and the relation between them (right axis)



Sources: based on figures from CONASAMI (2025) and CONEVAL (2023)

VII. CONCLUSIONS

As indicated by the analysis, Mexico's per capita GDP and most labor market indicators have not fully recovered to pre-pandemic levels; in fact, some have worsened. The government has implemented a variety of social programs aimed at increasing basic incomes, including raising the minimum wage which pay the employers by a year average of 20.8% during 2019–2024. Additionally, social programs, equivalent to cash transfer, now account for 10% of the federal budget and 2% of GDP, and keep growing. However, this comes at the expense of capital investment and human capital development, particularly in areas such as education, training, health, capacity building, and science and technology. These changes are occurring at a time when the external conditions of the Mexican economy have been significantly altered due to changes in the US trade policy. The imposition of tariffs on Mexico's exports to the US, which receives 85% of total exports, not only impacts the external engine of the economy, but also leads to a decline in consumption and investment, as well as a decrease in new foreign investment.

How do cash transfers and the increase in the minimum wage hide the weaknesses of the labor market? Many people who receive transfers have stopped actively looking for work and are considered discouraged workers. This means that they may re-enter the workforce if they were paid the minimum wage or if other labor market conditions improved, potentially earning two incomes. However, their withdrawal from the labor market also lowers the overall labor force participation rate, especially among women, which is already one of the lowest in the OECD and Latin America.

There are 14 active social programs that collectively receive 987 trillion pesos in the 2026 federal budget, with 59% allocated to the Elderly People Program and 2.6% to the Youngsters Building the Future Program. The former provides support to women aged 60 and older and men aged 65 and older with 35% of a minimum wage and potentially benefits 13.5 million individuals. Although the stipend is low, it is expected to increase in the coming years. The latter targets individuals between 15 and 29 years old who may not pursue upper secondary and higher education levels, as evidenced by the 2018–2024 data showing a consistent 9.2 million individuals in this category.

This is even though over 9 million individuals turned 15 years old during that period, i.e., became part of the active labor force if not in high school, college, or university, or with a serious incapacity. The benefits of the program are equivalent to a minimum wage. Both programs exemplify how labor market dynamics can influence individuals to opt out of the workforce during their early or late productive years.

If 15-year-olds are not enrolled in high school, college, or university, do not have a disability or are not retired, they are likely part of the economically active population as either employed or unemployed individuals (only 2.6% of the active labor force fall into this category), or part of the non-economically active population due to market conditions. 61% of new labor market entrants between 2018–2024 fit this description. This aligns with the fact that, on average, 2 out of every 3 new jobs created in the economy are informal. Such a large informal population accounts for only 26% of GDP, and this results in an annual increase in average labor productivity at negligible levels.

Entrepreneurs argue that the most effective social program in Mexico should focus on promoting formal employment. They are increasingly recognizing the potential benefits of unemployment insurance over certain existing social programs, even though it would necessitate the allocation of private resources. Formal employment not only leads to higher productivity but also ensures mandatory social security, tax compliance, and quality assurance for goods and services. Therefore, the goal should be to have approximately one million new wage workers registered with IMSS each year, encompassing individuals transitioning from the informal sector, the unemployed, and those who have become discouraged, rather than the figure of 317 thousand per year observed from 2019–2024.

In addition, more attention should be paid to the manufacturing and other productive sectors, where productivity is higher. Specific education and training programs, as well as regional mobility of the labor force, the implementation of comprehensive formalization programs and a serious National Employment Service, should be put in place. Currently, the only program operating is the Simplified Tax Regime (RIF), which was part of the tax reform implemented in 2014, more than a decade ago. It aimed to exempt newly established enterprises from paying Income Tax (ISR) during the first two years of operation. However, there are

other expenditures that prevent entrepreneurs from formalizing their businesses, including health, accident, and life insurances, as well as housing and pension funds, which involve costs at least 27.5% over the nominal wage. These expenditures are administered by three tripartite institutions: IMSS, The Saving for Retirement System (SAR), and the National Workers' Housing Fund Institute (INFONAVIT).

Based on the results of ENIGH, which show that labor income accounts for two-thirds of the total income reported by families on average and was boosted during 2019–2024 thanks to the 20.8% yearly average increase in the minimum wage, authorities argue that this policy is solely responsible for the reduction of poverty in that period. However, considering the results and the fact that Mexico's minimum wage is now positioned as one of the top five in Latin America, it is expected that its average annual growth will decrease to 10% in 2025–2030. This figure is derived from the official goal of ensuring that an average family of 3.4 members can afford to purchase 2.5 social basic needs baskets (both food and non-food goods and services) with one minimum wage. In real terms, this implies a total increase of 39%, which translates to a 5.64% average annual growth rate in 2025–2030.

Following labor income, according to ENIGH 2024 transfers contributed on average 17% to family income, going up to 36% for families in the first income decile. Social programs, government benefits, and scholarships make up most transfers, representing 86% of them.

The data shows a more equitable income distribution in 2024 compared to 2018, but it also highlights a concerning trend of increasing wage concentration at the lowest level. The proportion of people earning between zero and one minimum wage has risen from 30.8% in 2018 to 57.6% in 2024. Conversely, the percentage of individuals earning four or more minimum wages has declined from 35.5% to 9%, marking a substantial 75% decrease. This narrowing disparity between the lowest-paid workers and those earning higher wages involves a reduction of inequality but also raises development concerns. Ideally, efforts should be made to uplift those at the bottom of the income scale rather than bringing down those who are better off. This trend is not conducive to societal progress and may have negative implications for overall economic stability and social well-being.

In the post-pandemic era, there has been a rise in labor turnover, causing a higher movement of workers in and out of formal employment. This has made it challenging for the informality rate to drop below 54.5%. Consequently, only a small percentage of workers can accrue enough working hours to contribute to their pension funds and less may not qualify to receive the minimum pension benefits at the end of their working lives.

The effective pressure rate, which also could be called labor force underutilization rate, accurately reflects job search activity and workers' willingness to seek new employment due to factors like long work hours or low wages. This has risen from 25.51% in the fourth quarter of 2018 to 40.4% in the same quarter of 2024.

It is worth noting that the methodology for the ENIGH survey changed in 2022, impacting the calculations for 2016, 2018, and 2020, and defined that for 2024. All data was adjusted for consistency over time. This adjustment also affected poverty and inequality figures based on income distribution from the ENIGH. Both multidimensional poverty and the Gini index have shown improvements during the period, with multidimensional poverty decreasing from 52.2% to 38.5% and the Gini index from 0.49 to 0.42. These figures may require further evaluation in the future.

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Grammar and Syntax: Understanding Their Differences and Interrelatedness

Etienne Mupemba Kabwe Kantanda⁵

ABSTRACT

Many scholars affirm that syntax is a part of grammar. Some others illustrate it by saying that grammar is a book and syntax is a chapter of this book. This fact has attracted my attention to the extent that I attempt to answer the question: is it true that syntax is a part of grammar and grammar is not a part of syntax? To answer this question, I collected different ideas from scholars who write about grammar and syntax so as to analyze them. Therefore, this article aims at explaining that grammar is grammar and syntax is syntax although they share some common points. In general, sciences are interrelated. Although sciences are interrelated, each science distinguishes itself from other sciences by its properties, characteristics, methods, and subjects of study. Having this in mind, it is clear that grammar and syntax are interrelated and each of them is a particular discipline. This is to say that syntax is a discipline different from grammar which is also another discipline. A discipline cannot be a part of another discipline. If a discipline is a part of another discipline, therefore that discipline is not a discipline. It is not justifiable to say that syntax is a part of grammar and deny that grammar is not a part of syntax since a whole is made of parts. If syntax is a part, grammar is also a part. It means that grammar without syntax, grammar is no longer grammar because its part that makes a whole is missing. If this is true, syntax is a part of grammar, and grammar is a part of syntax. In fact, grammar and syntax are distinct disciplines.

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I. INTRODUCTION

Many scholars are convinced that syntax is a part of grammar, and grammar is not a part of syntax. This fact has carried many scholars off to the extent that they believe that it is true. Considered as a true fact, many articles and books spread it in the area of linguistics and grammar. In fact, each discipline is distinct. This distinctive aspect is what makes to call a body of specific knowledge a discipline. This is to say that a discipline should not be a part of another discipline otherwise it is not a discipline. Syntax is a discipline, and grammar is also a discipline. This is why we call one "syntax" and the other one "grammar". To put it clear, syntax is a distinct discipline, and grammar in another one although they are interrelated as it is the case of all disciplines. Disciplines are "interdisciplinary", "multidisciplinary", and "transdisciplinary". This article attempts to explain that grammar and syntax are two different disciplines although they sometimes deal with the same matters which are studied differently. This fact shows that some notions of syntax are studied in grammar, and some notions of grammar are also studied in syntax. The question 'is it true that syntax is a part of grammar, and grammar is not a part of syntax?' is asked to guide this investigation. To answer it, some ideas are collected and analyzed with content analysis method.

II. BACKGROUND

Grammar and syntax are disciplines involved in language analysis. Both of them have rules and categories. Rules which are concerned with grammar are known as grammar rules while those concerned with syntax are called syntax rules. It is the same as grammatical categories and syntactic categories. Apart from grammar rules, syntactic rules, grammatical categories, and syntactic categories; there are also grammatical functions and syntactic functions. These rules, categories, and functions are very often used in the analysis of language structures. When using them, some people do not distinguish what is grammar and what is syntax. Because of their confusion, they use grammar rules and syntax rules interchangeably. This happens even for grammatical categories and syntactic categories, and grammatical and syntactic functions. Therefore, they do not pay attention to what grammar is and what syntax is. It is important to know what grammar is and what syntax is.

III. LITERATURE REVIEW

3.1 Grammar

There are many definitions of grammar. The common point of many definitions is that grammar is a set of rules of language. For Chomsky, humans are born with the capacity to learn languages. He calls this capacity Language Acquisition Device. In the same vain, he introduced the notion of Universal Grammar to mean that the human brain is capable of generating language rules. The rules of language are studied in various ways. This is why there are different grammars.

A. Descriptive Grammar

Rossiter (2020), in the link <https://linguapress.com/grammar/descriptive-grammar-english>, says "descriptive grammar is grammar that takes account of how a language is really used, not necessarily of how it should be used." Nordquist (2025), in the link <https://thoughtco.com/what-is-descriptive-grammar-1690430>, views descriptive grammar as "an examination of how a language is actually being used, in writing and in speech". The focus of descriptive grammar is how language is or is being used. Simply put, descriptive grammar observes how language users apply the rules of language.

B. Prescriptive Grammar

In the link <https://www.languagehumanities.org/what-is-prescriptive-grammar.htm> Lapham (2024) writes "prescriptive grammar is a philosophy or approach to grammar that concerns itself with the establishment of grammatical norms that can be used to define spoken or written language as either grammatically correct or grammatically incorrect". Prescriptive grammar states the rules that language speakers or writers are supposed to respect when using language. The concern of prescriptive grammar is to state rules to be used by those who use language whereas syntax deals with rules related to phrase, clause, and sentence construction.

C. Pedagogical Grammar

Studymaster, in the link <https://www.studymaster.co.uk/explanations/english/tesol-english/pedagogical-grammar/>, explains that "pedagogical grammar is an approach to teaching grammar that focuses on making grammatical rules comprehensible and applicable for language

learners, primarily targeting their needs for communication and usability rather than theoretical knowledge". Pedagogical Grammar focuses on the rules that language learners are supposed to learn in order to communicate in the target language. Comparing to prescriptive grammar, pedagogical grammar deals with the teaching of rules of a language. This type of grammar teaches sentence structures such as V, SV, SVO, SVC, etc. whereas syntax analyzes phrasal structures such as NP, VP, AdjP, AdvP, PP, etc.

D. Reference Grammar

<https://www.theknowledgeacademy.com/blog/types-of-grammar/> indicates that "a reference grammar explains how words, phrases, and sentences are formed in a language. It provides clear grammar rules and examples". Reference Grammar seems to be near syntax as the study of how phrases and sentences are constructed. The difference is that grammar provides grammatical rules while syntax provides syntax rules.

E. Theoretical Grammar

It is written in the link <https://www.theknowledgeacademy.com/blog/types-of-grammar/> "theoretical grammar studies the basic building blocks of any human language. It focuses on explaining grammar rules in a clear and structured way". Theoretical grammar explains grammar rules.

F. Comparative Grammar

<https://www.theknowledgeacademy.com/blog/types-of-grammar/> writes "comparative grammar compares different languages to see what's similar and what is different. It helps language learners and linguists understand the connections between languages". This is to say that comparative grammar focuses on the comparison of grammar rules of languages.

G. Traditional Grammar

<https://www.theknowledgeacademy.com/blog/types-of-grammar/> indicates that "traditional grammar is a set of rules that explain how language should be used. It focuses on the difference between everyday speech and what is considered "correct" according to established standards". Traditional studies how language is used, and how much grammar rules are respected or not respected.

H. Performance Grammar

<https://www.theknowledgeacademy.com/blog/types-of-grammar/> shows that "Performance Grammar describes how English sentences are actually used in effective communications. It focuses on how people create and use language naturally". Performance Grammar deals with the use of grammar rules in communication.

I. Communicative Grammar

<https://www.my-english-club.com/communicative-grammar.html> affirms that "communicative grammar puts the accent on the actual act of communication. It gives the speaker all the tools for an effective transmission of the intended message". The concern of communicative grammar is the conveyance of message without any attention to grammar rules.

J. Functional Grammar

Panggabean (2011 :47) views functional grammar as "a way of looking at grammar in terms of how grammar is used. It is used for describing languages in functional terms. It focuses on the development of grammatical systems as a means for people to interact with each other". Functional grammar deals with the use of language that facilitates the conveyance of meaning in communication. Here, grammar rules are applied to render meaning easy to grasp.

K. Mental Grammar

Nordquist (2020) in the link <https://www.thoughtco.com/mental-grammar-term-1691380> writes "mental grammar is the generative grammar stored in the brain that allows a speaker to produce what other speakers can understand. It is also known as competence grammar and linguistic competence. It contrasts with linguistic performance, which is the correctness of actual language use according to a language's prescribed rules". Mental Grammar is the natural processing of language by the brain for the sake of communication.

3.2 Syntax

Etymologically speaking, syntax means arranging together. Syntax is the study of how words are arranged together within a sentence. In linguistics, syntax is one of the levels of the study of language. These levels are phonetics, phonology, morphology, syntax, semantics, pragmatics, and discourse analysis. Koenenman and Zeijlstra (2017) say that "syntax is the system of rules that we

subconsciously follow when we build sentences". In this perspective, syntax is concerned with what happens in the human brain when constructing sentences. The human brain applies rules automatically to build sentences. This supports Chomsky's universal grammar. It is clear that rules of languages are naturally set in the human brain. If grammar is viewed as a set of rules of a language, one can understand that grammar is also a concern of syntax. Syntax seems to include grammar, and grammar refers to syntax for its analysis. This is why the assumption that syntax is a part of grammar is questionable.

3.3 Grammar versus Syntax

Haines (2024) states "grammar is a set of rules governing correct word strings in a language or text" whereas "syntax is the arrangement or order of words and phrases to create clear, well-formed sentences". For MasterClass (2021), "grammar is a system of rules that governs the structure of language" whereas "a subset of grammar, syntax is a set of rules that describes the word order and structure of a sentence within a natural language". MasterClass (ibidem) adds "syntax is a part of grammar, the overarching rules dictating the structure of a language. All syntax rules are grammar rules, but not all grammar rules are syntax rules". Coldwell (2023) assumes that "syntax is the set of rules that govern sentence structure in a language and how words are arranged to convey meaning" whereas "grammar, on the other hand, is the set of rules that govern the structure of a language as a whole". Iseli (2023) believes that "grammar is a general term used to describe the system behind a language, while syntax is simply a subfield of grammar that particularly deals with how words are organized to make grammatical constructions". Osmond (2024) writes "basically, syntax is a part of grammar and the study of sentence while grammar is a discipline or an area of study when it comes to verb agreements and the building of punctuation". Hasa (2016) in the link <https://pediaa.com/difference-between-grammar-and-syntax/> says that "Syntax is a field of linguistics that studies the structure of a sentence whereas grammar is a set of structural rules that dictates the construction of sentences, clauses, phrases and words in a language".

3.4 Grammatical Categories and Syntactical Categories

According to the link <https://www.englishclub.com/grammar/sentence/category.php> a "grammatical category refers to specific properties of a word that can cause that word and/or a related word to change in form for grammatical reasons (ensuring agreement between words)". This is to say that each word has its grammatical category. It is a fact that words are classified in what is known as 'parts of speech'. The parts of speech are nouns, pronouns, verbs, adjectives, adverbs, prepositions, conjunctions, and interjections. Some scholars confuse parts of speech and grammatical categories. Each part of speech has its grammatical categories. Grammatical categories of nouns are number, case, and gender. Zubaydulla qizi and Abdulmutolib qizi (2023) write "categories associated with nouns, such as number, case, and gender, provide syntactic flexibility and semantic precision". Pronouns have grammatical categories such as person: the first person, the second person, and the third person. Verbs have grammatical categories such as tenses, aspects, mood, transitivity, voice, and argument agreement. Grammatical categories of adjectives are comparison and agreement. Here, the understanding is that grammatical categories are embedded in syntactic categories.

3.5 Grammar Rules and Syntax Rules

A rule is a requirement that guides the right use.

<https://www.fiveable.me/key-terms/english-grammar-usage/grammar-rules> indicates that "grammar rules are the set of guidelines that govern how words and phrases are structured and used in a language".

<https://microfocus.com/documentation/visual-cobol/vc60/devhub/hrhlhclanu922.html> shows that "syntax rules are those rules that define or clarify the order in which words or elements are arranged to form larger elements, such as phrases, clauses, or statements".

3.6 Grammatical Functions and Syntactic Functions

<https://fiveable.me/key-terms/introduction-linguistics/grammatical-function> states "grammatical function refers to the role that a word or phrase plays in the structure of a sentence, indicating how it relates to other elements within that sentence". Words mainly play the roles such as: subject, verb, object, complement, and adjunct. These functions are also considered as syntactic functions. But, syntax views a sentence as a

constituent made of subject and predicate. A word in a sentence can play different functions depending on the theory used during the analysis. <https://www.bing.com/copilotsearch?q=grammatical+functions+versus+syntactic+functions&form=csbr> and "Grammatical functions refer to the roles that constituents play within the grammatical architecture of a clause or sentence. They answer "who does what to whom" in a structural or relational sense and are essential for understanding

sentence organization and agreement patterns". <https://www.bing.com/copilotsearch?q=grammatical+functions+versus+syntactic+functions&form=csbr> and "Syntactic functions or forms focus on the categorical and structural type of a constituent within a sentence. They describe what a segment of language is rather than what it does structurally". The following table from the link above shows the difference between grammatical function and syntactic function.

Aspect	Grammatical Function	Syntactic Function (Form)
Focus	Role in clause structure	Categorical nature/type of constituent
Example	Subject, Object, Modifier	NP, VP, PP, AdjP
Determined by	Position, agreement, and verb selection	Lexical category and internal structure
Relation to semantics	Sometimes corresponds to semantic roles (agent/patient), but not always	Independent of meaning, purely formal
Flexibility	Each NP/VP can realize different grammatical functions	One segment can be classified as one syntactic form at a time

(<https://www.bing.com/copilotsearch?q=grammatical+functions+versus+syntactic+functions&form=csbr>)

IV. METHODOLOGY

4.1 Syntax, part of grammar

The word 'part' is opposed to the word 'whole'. Something which is a part of a whole is smaller than the whole. It is a portion, a section or a component of a large thing. If syntax is considered as a part or subset of grammar, it means that syntax is smaller than grammar. Now, what makes syntax smaller than grammar? MasterClass cited above says that "all syntax rules are grammar rules, but not all grammar rules are syntax rules". This can be understood in two ways: syntax is grammar, but grammar is not syntax ($[S = G]$; $[G \neq S]$) or syntax is grammar, but some of grammar is not syntax ($[S = G]$; $[S \neq G]$) . The first way is contradictory because if syntax equals grammar, therefore

grammar equals syntax. In other words, syntax is grammar and grammar is syntax. This is to say there is no difference between syntax and grammar. The second way means that syntax is grammar, and grammar is partially syntax. If this is true, it means that grammar is sometimes syntax. As consequence, grammar is syntax to some extent.

4.2 Syntactic Rules versus Grammatical Rules

In the analysis of language, there are syntactic rules and grammar rules. Syntactic rules are word order, phrase structure, subject-verb agreement, modifier placement, question formation, etc. and grammar rules are sentence structure (subject and predicate) and basic word orders (SVO, SVC, etc.), parts of speech, subject-verb agreements (singular

and plural), verb tense/aspect, pronoun agreement (number and gender), punctuation, modifiers, parallelism, capitalization, voice, and word choice.

4.3 Syntactic Categories versus Grammatical categories

Syntactic categories are different from grammatical categories. Syntactic categories are lexical categories (parts of speech), phrasal categories (Noun Phrase, Verb Phrase, etc.), and Functional categories (determiners and auxiliaries). Grammatical categories are number, case, gender, person, tense, aspect, mood, voice, and degree.

4.4 Syntactic Functions and Grammatical Functions

Syntactic Functions are the types of phrases whereas Grammatical Functions are the roles that words play within a constituent. That is to say that syntax does not deal with the word roles within a constituent. It deals with Noun Phrases, Verb Phrases, Adjective Phrases, Preposition Phrases, etc. whereas grammar deals Subject, Verb, Object, Complement, etc.

V. RESULTS

5.1 Common Facts between Grammar and Syntax

Referring to the above analysis, grammar and syntax have common facts that make them look alike. These facts are parts of speech and word order. This is to say that both grammar and syntax deal with the parts of speech (nouns, pronouns, verbs, adverbs, adjectives, etc.), word order, and subject-verb agreement.

5.2 Different Facts between Grammar and Syntax

Apart from the fact that grammar and syntax have the parts of speech and word order in common, the above analysis shows that grammar and syntax deal with language differently. Syntax focuses on the parts of speech whereas grammar focuses on the properties of the parts of speech. Syntax rules are concerned with how phrases are combined whereas grammar rules are concerned with how subject, verbs, object, etc. are combined. As far as functions are concerned, syntax deals with the types of phrases; grammar deals with the roles played by words within a sentence.

VI. DISCUSSION

Grammar and syntax are two distinct sciences. As all sciences, they have some common points which are viewed differently. Let us start with parts of speech and word order. As far as parts of speech are concerned, they are mainly syntactic categories which have their grammatical categories. Each syntactic category has a grammatical category. In this perspective, grammar is related to syntax because before analyzing the grammatical categories one should start with syntactic categories. It means that grammar needs syntax before it looks at its own categories. For example, syntax deals with nouns whereas grammar deals with the properties of nouns which are numbers, gender, cases, etc. To put it simple, before dealing with numbers, gender, or cases (which are grammatical categories of the syntactic category 'noun') one should start looking at nouns which are a syntactic category. If the parts of speech are studied in grammar, it is for the sake of analyzing their grammatical categories. For the word order, syntax deals with phrase structures whereas grammar deals with subject-predicate structure. In another way, syntax deals with how words are combined in phrases and how phrasal structures are combined into sentences whereas grammar deals with how subjects, verbs, and objects are combined into clauses and sentences. Regarding functions, grammar looks at the roles that words play in the structure whereas syntax looks at the types of phrases in the structure. There is no confusion between grammar and syntax. Each of them is an entire discipline that has its specific subjects of study. Thus, syntax is not a part of grammar. It is an entire and distinct discipline with its specific subjects of study. What is right is that syntax and grammar are interrelated, but each of them has its specific scope.

VII. CONCLUSION

The idea that syntax is a part of grammar was the problem that brought to this discussion. The discussion was guided by the question "is it true that syntax is a part of grammar and grammar is not a part of syntax?". The objective was to explain that grammar is grammar and syntax is syntax. Different views of scholars were analyzed with the content analysis method. After the analysis, it was found that grammar and syntax share some common points. These common points are not studied in the same way in grammar and in syntax. This fact

distinguishes syntax from grammar to the extent that it is not right to say that syntax is a part of grammar. What is acceptable to say is that grammar and syntax are interrelated. Although they are interrelated, each of them is an entire and a distinct discipline.

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The Right of Entry: Spatial Politics and the Gendered Home in Kundanika Kapadia's Seven Steps in the Sky

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ABSTRACT

This paper explores the intersection of spatiality, gender, and agency in Kundanika Kapadia's seminal Gujarati novel, Seven Steps in the Sky (Sat Pagla Aakashma). Moving beyond purely Western spatial theories, this study employs a framework grounded in Indian feminist criticism and post-colonial theory—engaging with the works of Partha Chatterjee, Tanika Sarkar, and Michel Foucault. It argues that the domestic sphere in the novel functions not merely as a private dwelling but as the “inner domain” of cultural preservation, where the female subject is surveilled and silenced to maintain the sanctity of the patriarchal kula (clan). The paper analyzes the protagonist Vasudha's trajectory from the stifling enclosure of her marital home to the limitless expanse of the “sky”, interpreting this journey as a radical reclamation of the swadharma (self-duty) that transcends traditional domestic obligations.

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I. INTRODUCTION: THE MYTH OF THE SANCTUARY

The literary geography of the Indian novel has often contested the Western notion of the “home”

as a site of privacy and individual nurturing. In Kundanika Kapadia's Seven Steps in the Sky (Sat Pagla Aakashma), the home is not a Bachelardian “felicitous space” that shelters the dreamer from the storms of the world; rather, it is the storm itself, frozen into the architecture of walls, thresholds, and

locked doors. The novel serves as a rigorous investigation into the spatial politics of the middle-class Gujarati household, revealing it to be a sophisticated apparatus of gendered confinement. Through the protagonist Vasudha, Kapadia critiques the “Right of Entry”—the privilege to occupy space as a sovereign subject—which is systematically denied to women within the domestic sphere.

Vasudha’s narrative begins with a profound sense of dislocation. The transition from her father’s house to her husband Vyomesh’s house is not a movement from one home to another, but a transfer between two institutions of containment. She reflects early in the text on the ontological homelessness of the Indian woman: in her childhood home, she is a “guest” awaiting departure; in her marital home, she is an “outsider” awaiting assimilation. This perpetual transience suggests that the woman has no natural habitat; she is a squatter in the house of patriarchy, residing there only by the grace of her functional utility.

To understand the specific texture of Vasudha’s confinement, one must situate the novel within the post-colonial framework of the “inner” and “outer” domains. Partha Chatterjee, in *The Nation and Its Fragments*, argues that Indian nationalism resolved the conflict with colonial modernity by dividing the world into two spheres. The “outer” domain is the material world of economy and statecraft, where the man must navigate Western influence. The “inner” domain is the spiritual, domestic sphere, which must remain the uncolonized sanctuary of “true” Indian identity. The burden of maintaining the purity of this inner domain falls entirely on the woman.

In *Seven Steps in the Sky*, Vyomesh embodies the hypocrisy of this dichotomy. He is a modern man in the outer world—ambitious, rational, and socially mobile. However, he demands that his home remain a fortress of feudal values. He requires Vasudha to be the static anchor to his dynamic life. Her immobility is the precondition for his mobility. Every time Vasudha expresses a desire to learn, to read, or to engage with the world outside, Vyomesh perceives it as a breach of the “inner domain.” He does not fear her physical departure as much as he fears her intellectual migration. If the guardian of the culture (the wife) begins to think like a modern individual, the sanctity of the home—and by extension, his identity as a traditional *Grhastha* (householder)—collapses. Thus, the walls of the house are fortified against new ideas, turning the

home into a museum of obsolete values where Vasudha is both the curator and the exhibit.

The structural organization of Vyomesh’s household operates on the logic of the Panopticon, as described by Michel Foucault. In a Panopticon, power is visible and unverifiable; the inmate must always behave as if they are being watched. In the novel, this surveillance is not conducted through guard towers but through the “unspoken rules” and the omnipresent gaze of the family unit.

The architecture of the house denies Vasudha any privacy. The concept of a “Room of One’s Own”, famously championed by Virginia Woolf, is an impossibility in the joint family structure depicted by Kapadia. Space is communal, which effectively means it is policed. Vasudha is constantly visible—to her husband, to her mother-in-law (Faiba), and to the extended family. This visibility is not benign; it is a mechanism of control. When she is in the kitchen, she is watched for efficiency; when she is in the living room, she is watched for decorum. The character of Faiba represents the internalization of this surveillance. Having been a victim of the patriarchal structure herself, Faiba does not seek to dismantle the prison but to become its warden. She scrutinizes Vasudha’s movements with a critical eye, enforcing the “laws” of the house—how to cook, how to dress, how to speak. This dynamic illustrates how spatial politics often pits women against one another, fighting for meager territory within a structure owned by men.

The layout of the house reflects a rigid, caste-like hierarchy of gendered space. The Living Room (Baithak) constitutes the seat of power. It is the stage for male performativity, where Vyomesh entertains guests, discusses politics, and asserts his social status. Vasudha’s relationship to this room is purely functional. She enters the living room not as a participant in the discourse but as part of the infrastructure—silent, efficient, bearing tea and snacks. Her “Right of Entry” is conditional on her silence. She is there to verify Vyomesh’s status as a man who is well-served, not to exist as a person with opinions. When she attempts to speak, her voice is treated as “noise” that disrupts the serious male signal.

In stark contrast, the Kitchen (Rasodu) is the designated female enclosure. However, Kapadia refuses to romanticize this space. It is not the “heart of the home” but a site of repetitive, invisible labor. It is a “morgue” where dreams are preserved

in pickle jars. The kitchen is designed to consume the woman's time and energy so completely that she has none left for rebellion. The heat, the smoke, and the endless cycle of cooking and cleaning act as physical barriers to her intellectual growth. Vasudha feels the "heaviness" of the air in the kitchen—a sensory description of her stagnation. She is the Annapurna (Goddess of Food) who feeds everyone but is herself starving for intellectual nourishment.

Kapadia uses the material culture of the home to further highlight Vasudha's alienation. The house is filled with objects—furniture, utensils, decorations—that Vasudha is expected to maintain. She spends her life polishing surfaces that do not belong to her. The novel poignantly contrasts the abundance of domestic objects with the scarcity of intellectual objects. The motif of "books" is central to this spatial analysis. In the Indian bridal tradition, the trousseau includes jewelry, clothes, and stainless steel—objects that define the body and labor. Books are conspicuously absent. Vasudha notes the cruelty of this omission: "Jewellery and utensils don't teach anything... But no parent ever gives books."

The absence of a bookshelf for the bride is a deliberate architectural exclusion. A book represents a portal to the "outside", a breach in the wall. By denying her books, the family attempts to seal the cracks through which she might escape into a "counter-space" of the mind. Vasudha is surrounded by things that demand her service, but she possesses nothing that serves her soul. She is trapped in a world of matter, denied entry into the world of the mind. This material deprivation reinforces the "architecture of confinement" that is the antagonist of the novel. Before Vasudha can take her steps towards the sky, she must first map the contours of her prison. She must realize that in Vyomesh's house, she is everywhere as a servant, but nowhere as a citizen. The silent violence of the domestic sphere lies not in explicit physical restraint, but in the relentless erasure of the self through the control of space and objects.

If the architectural layout of the house provides the static framework of confinement, the rituals of entry provide its geometric logic. The "Right of Entry" into the domestic sphere is not a simple unlocking of a door; it is a complex, ritualized surrender of sovereignty initiated by the wedding itself. The title of Kundanika Kapadia's novel, *Seven Steps in the Sky* (Sat Pagla Aakashma), functions as

a profound ironic counterpoint to the central rite of Hindu marriage: the Saptapadi. Traditionally, these seven steps taken around the sacred fire symbolize a co-pilgrimage of the couple towards Dharma (duty), Artha (wealth), Kama (desire), and Moksha (liberation). It is inherently a ritual of movement, implying a linear journey forward into a shared life of mutual spiritual growth. However, Kapadia engages in a radical revisionist reading of this rite, positing that for the female protagonist, Vasudha, the Saptapadi acts not as a vector of liberation but as a geometric circumscription. Instead of a progression towards the "sky"—the novel's ultimate metaphor for limitless possibility—the steps trace a tight circle that hermetically seals the woman inside the domestic sphere.

This "geometry of containment" is evident from the very inception of Vasudha's marital life. The ritual, ostensibly a sacrament of union, functions socially as a contract of transfer. The concept of Kanyadan (the gift of the maiden) underscores the transactional nature of the wedding, where the guardianship of the female body is passed from the father to the husband. Kapadia subverts the sanctity of this transfer by highlighting the terrifying finality of the "seventh step." For Vasudha, the completion of the ritual does not open a door; it closes a gate. The vows she recites—promising service, fidelity, and obedience—are not mutual pledges of partnership but unilateral declarations of surrender. As critic Vrinda Nabar argues in *Caste as Woman*, the Hindu marriage ritual is the "primary institutional mechanism" through which the caste-patriarchy nexus exerts control over female sexuality and labor. In Kapadia's narrative, the Saptapadi effectively transforms Vasudha from a mobile subject into a fixed object, rooted to the spot of her husband's home. The movement around the fire is the last free movement she is allowed; thereafter, her orbit is fixed around the husband-sun.

Once the circle is closed, the boundary is reinforced by the concept of the threshold, or the Umbaro. In the cultural imagination of the Indian middle class, the threshold is not merely an architectural feature but a moral boundary, heavily laden with mythological significance. It evokes the Lakshman Rekha from the Ramayana—the protective line drawn by Lakshmana to safeguard Sita. However, feminist scholars like Nabaneeta Dev Sen and Jasbir Jain have long pointed out the double-edged nature of this protection. The Rekha protects the woman only insofar as she accepts her

captivity; the moment she exercises agency to cross it, she is punished.

In *Seven Steps in the Sky*, the “unspoken rules” of Vyomesh’s household function as a modern, invisible Lakshman Rekha. Vasudha is indoctrinated with the belief that safety lies in immobility. The world outside the threshold is coded as “unsafe”, chaotic, and morally compromising for a woman of “good family.” Yet, Kapadia brilliantly inverts this mythology. The narrative reveals that the true danger to Vasudha’s spirit does not reside in the “Ravanas” of the outside world, but in the suffocating “safety” of the interior. The threat is domestic, not foreign. By keeping her within the Rekha, Vyomesh does not protect her from harm; he protects his own honor (izzat) from public scrutiny. The threshold, therefore, becomes a site of intense policing. Every time Vasudha approaches the door—whether to buy vegetables or to simply look out—she is reminded of her boundaries. Her physical movement is tethered, creating a psychological state where she feels “heaviness” even when standing still.

The spatial politics of the home extends aggressively to the most intimate territory of all: the female body. If the house is the “inner domain” of the nation, the woman’s body is the “inner sanctum” of the house, and it must be kept inviolate. However, Kapadia exposes a disturbing paradox: the woman’s body is inviolate to the outside world only so it can be violated with impunity by the husband. The transition from the public threshold to the private bedroom does not bring freedom; it brings a different, more intrusive form of occupation.

Vyomesh’s relationship with Vasudha is defined by a distinct separation between her Sharir (body) and her Atman (self/soul). He claims absolute ownership over the former while remaining aggressively indifferent to the latter. The bedroom, typically romanticized in literature as a sanctuary of private love, is depicted by Kapadia as a site of silent, sanctioned violation. Vasudha’s internal monologues reveal a profound dissociation during moments of physical intimacy. She remarks with chilling clarity, “You only know my body, that’s all you enjoy of me. And I feel repelled because I have a heart. I am not only a physical body.”

This statement constitutes a spatial critique of the marital bed. Vyomesh treats her body as property he has the “right of entry” to by virtue of the marriage contract. The concept of consent is

rendered moot by the institution of marriage itself, which, in the traditional context, views the wife’s sexual availability as a permanent obligation. Veena Das, in her work on the “language of pain”, suggests that the female body often speaks the language of compliance while the self screams in silence. Vasudha’s revulsion is a desperate attempt to reclaim the “boundary” of her own skin. She retreats into the recesses of her mind, leaving her body behind like an empty shell—a “house” that Vyomesh occupies but does not truly inhabit.

The hierarchy of the household is further spatialized through the daily rituals of food and eating. In the traditional Gujarati household depicted in the novel, the dining table is not a circle of communion but a stratified pyramid of consumption. The order of eating—men first, children second, women last—is a spatial enactment of the family’s value system. Vasudha’s role is that of the Annapurna (the goddess of food), but Kapadia strips this title of its divine power, revealing the exhaustion underneath. She is the provider, yet she is excluded from the act of enjoyment. The dining area becomes a “border zone” where she is present as infrastructure but absent as a participant.

This marginalization is reinforced by the subtle violence of criticism. If the salt is low or the roti is cold, the critique is directed at Vasudha’s “service”, interpreting a minor domestic lapse as a moral failure. When she finally sits down to eat, often alone or with Faiba, she consumes the “leftovers” of the family’s time and energy. This is reminiscent of the concept of Joothan (pollution), though here it operates within the caste-privileged home as a gendered pollutant. K. Satchidanandan has described the kitchen in Indian women’s poetry as a “morgue” where dreams are preserved in jars. For Vasudha, the act of eating is purely functional—refueling the machine so it can serve again the next day.

The Hindu ideal of the Ardhangini suggests that the husband and wife are two equal halves of a whole. However, Kapadia illustrates that in the lived reality of Vyomesh’s world, the wife is not a half; she is a shadow. A shadow has no mass, no dimension, and occupies no space of its own; it merely mimics the movement of the object it is attached to. Vasudha’s struggle throughout the early chapters is the struggle to gain “dimensionality.”

The “seven steps” led her into a hall of mirrors where she sees only the infinite reflections of what

she should be. The Saptapadi did not lead to the sky; it led to the ceiling. The roof of Vyomesh's house becomes the limit of her vision. Every time she looks up, seeking the expanse of the Aakash (sky), her gaze is intercepted by the beams and plaster of domesticity. This architectural blocking is deliberate; the patriarchal home seeks to eliminate the uncontrollable vertical axis of the sky. By keeping Vasudha's gaze fixed on the floor (modesty) or the stove (labor), the house prevents her from looking up. The "Right of Entry" she ultimately begins to crave is the right to enter the vertical axis—to ascend. But to do so, she realizes she must dismantle the horizontal "steps" that bind her. The revocation of the marriage vow becomes the only way to fulfill the vow to her own Atman.

If the external architecture of the home is designed to enforce the "Duty of Remaining", as established in the previous sections, the protagonist Vasudha initiates her rebellion through what can be termed an "Insurrection of the Interior." To fulfill the vow to the Atman requires a transgression that is initially invisible, taking place within the silent, unmapped cartography of the mind. Kundanika Kapadia masterfully delineates this phase of resistance not as a physical departure—which constitutes the climax of the novel—but as a psychological secession. Before Vasudha can physically leave Vyomesh's house, she must first evict Vyomesh from her internal consciousness.

This process begins with the reclamation of silence. In the cacophony of the joint family, where every female utterance is expected to be an agreement, an apology, or a service, silence is often misread by the patriarch as submission. However, Kapadia reconstructs Vasudha's silence as an active, defiant withdrawal. Indian feminist critics like Susie Tharu have noted that for the subaltern woman, silence can function as a "strategic enclosure", a space where the self is preserved against the erosion of daily life. Vasudha's silence at the dinner table or in the bedroom is not emptiness; it is a refusal to participate in the charade of domestic bliss. By withholding her words, she denies Vyomesh the validation he seeks as the benevolent patriarch. She creates a "counter-space" within her own skull, a room that Vyomesh cannot enter because he does not possess the language to unlock it. This constitutes the first significant breach in the domestic Panopticon: the guard can see the prisoner, but he no longer knows what the prisoner is thinking.

Spatially, this internal rebellion is anchored by the architectural feature of the window. While the door represents the regulated entry and exit controlled by social norms and the husband's permission, the window represents the unregulated gaze. Vasudha's relationship with the "Sky" (Aakash)—the titular motif—is mediated through the window. In a house characterized by closed circles (the Saptapadi, the daily routine of cooking and cleaning), the sky offers a verticality that disrupts the horizontal oppression of the domestic.

Kapadia invests the sky with a specific agency; it is not merely a backdrop of nature, but an active interlocutor. When Vasudha looks out at the stars or the vast expanse of blue, she is engaging in a dialogue that bypasses the social hierarchy entirely. The sky does not ask for her caste, her marital status, or her culinary skills; it asks only for her capacity to witness. This engagement aligns Vasudha with the Indian Bhakti tradition, specifically the archetype of the female mystic like Mirabai. Just as Mira rejected the earthly husband (the Rana) for a divine lover (Krishna), thereby delegitimizing the domestic authority, Vasudha begins to reject the authority of Vyomesh in favor of an abstract, elemental truth. She does not seek a new lover in the human sense; she seeks an ontological vastness that the finite, petty space of the home cannot contain. The window, therefore, becomes a site of "spatial leakage", where the hermetic containment of the home fails, and the infinite bleeds in.

As Vasudha's dissociation from the domestic sphere deepens, the narrative introduces the concept of Anandgram—the community of service and spiritual liberation that stands in binary opposition to Vyomesh's household. In the context of spatial theory, Anandgram functions as what Michel Foucault calls a "Heterotopia"—specifically, a "Heterotopia of Compensation." Foucault describes these spaces as real places that function as "counter-sites", where the real sites within the culture are simultaneously represented, contested, and inverted.

If Vyomesh's home is a space of private accumulation, rigid hierarchy, and stifling tradition, Anandgram is constructed as a space of communal living, fluid roles, and liberating labor. It is the "perfect" space that highlights the "messy, ill-constructed" nature of the domestic reality Vasudha inhabits. Crucially, in this third part of the narrative arc, Anandgram exists for Vasudha

primarily as an idea—a mental refuge before it becomes a physical destination. It validates her intuition that “another way of living” is possible. The mere existence of Anandgram destabilizes the hegemony of the patriarchal home by proving that the Grhastha (householder) model is not the only valid form of existence.

Vasudha’s encounters with characters from this alternative world—like the empathetic and intellectually vibrant figures she meets—serve as incursions of the heterotopia into the home. These interactions emphasize the intellectual poverty of her marital life. Vyomesh’s conversations are restricted to money, status, and the trivialities of social climbing. In contrast, the discourse of Anandgram revolves around humanity, service, and the cosmos. This juxtaposition highlights the “spatial mismatch”: Vasudha’s body is trapped in a space of petty materialism, while her intellect belongs to a space of high idealism. The friction caused by this mismatch is the engine that drives the narrative toward its climax.

The tension between Vasudha’s internal counter-space and her external reality inevitably leads to the breakdown of her performance as the “ideal wife.” The Indian concept of the Pativrata—the wife who is wholly devoted to her husband—relies on a seamless integration of will and action. The wife must not only serve; she must want to serve. Vasudha’s rebellion disrupts this seamlessness. She continues to cook and clean, but the “affective labor”—the emotional warmth and devotion—evaporates.

Kapadia portrays this breakdown not as a hysterical outburst, but as a chilling clarity. Vasudha begins to look at Vyomesh and Faiba not with fear, but with the detached curiosity of an anthropologist observing a strange, cruel tribe. She deconstructs their rituals. Why must the woman eat last? Why must the widow shave her head (in the case of Faiba’s past)? Why is a son’s birth a celebration and a daughter’s a burden? By asking these questions, even silently, she strips the domestic rituals of their sacred aura, revealing them as bare mechanisms of power. This “de-sacralization” of the home is a pivotal moment of transgression. In a culture where the home is the temple of the family deity, treating it as a mere cage is blasphemy. Vasudha’s “madness”—as it is perceived by the family—is actually her sanity asserting itself against an insane system. She

realizes that the “peace” of the house is maintained by the “war” against her individuality.

A significant portion of Part III deals with Vasudha’s realization that the domestic space cannot be reformed; it can only be escaped. The liberal humanist solution—that the husband can be educated, or that the system can be tweaked to be more equitable—is shown to be a fallacy in the face of deep-seated patriarchal conditioning. Vyomesh is not a villain in the melodramatic sense; he is a product of his spatial conditioning. He cannot conceive of a wife who is an equal because his “mental map” of the world has no coordinates for such a relationship.

Vasudha attempts, at various junctures, to communicate her inner life to him. She tries to open the door to her “internal counter-space.” These attempts are met with incomprehension. Vyomesh dismisses her philosophical yearnings as “morbid” or “impractical.” This failure of communication confirms that the two inhabit different ontologies. They are legally cohabiting, but spatially, they are living in different dimensions. The Saptapadi bound their bodies, but it failed to bridge the abyss between their minds. Thus, the internal counter-space, initially a refuge, becomes a launchpad. Vasudha realizes that she cannot live a double life forever—a body in servitude and a mind in the sky. The cognitive dissonance becomes physically painful. The “heaviness” of the threshold transforms into an unbearable weight. The “Right of Entry” she desires is no longer just entry into a room of her own, but entry into a life where the inner and outer are aligned. She prepares to take the step that will shatter the Lakshman Rekha once and for all.

The tension accumulated in the domestic panopticon—the silence, the surveillance, and the dissociation—culminates in the act of rupture. Vasudha’s decision to leave Vyomesh’s house is the pivotal moment where the “internal counter-space” constructed in the previous chapters exteriorizes itself. In spatial terms, this is the most radical act a woman in the traditional Indian context can perform: the voluntary crossing of the Lakshman Rekha without the promise of protection from another male figure. Kundanika Kapadia frames this departure not as an act of abandonment, but as an act of arrival. When Vasudha steps over the threshold (Umbaro) for the final time, she dismantles the binary of “inside/safety” and “outside/danger.” The threshold, once a line of

prohibition, transforms into a line of liberation. This moment signifies the collapse of the patriarchal architecture that defined her existence. She does not leave because she hates Vyomesh, but because the space he commands has become too small for her expanding consciousness. It is a spatial necessity; the plant has outgrown the pot, and the pot must break.

The narrative treats this rupture as a reclamation of the "Right of Entry" into the world. By walking out, Vasudha asserts that she belongs to the cosmos, not to the clan (Kula). This aligns with the feminist critique of the private/public divide. As Carole Pateman argues, the separation of the private (domestic) and public (civil) spheres is the foundation of women's subordination. Vasudha's exit is a rejection of this separation. She moves into a space where her private self and her public actions can finally merge, rejecting the role of the "angel in the house" to become a human in the world.

Throughout the novel, the "Sky" functions as the central counter-motif to the "House." In this final section, the metaphor is fully realized. If the house is defined by its limits—walls, ceilings, locked doors—the sky is defined by its limitlessness. It is the ultimate "anti-architecture." It has no owners, no deeds, and no partitions. Kapadia writes of the sky not merely as a physical expanse but as a phenomenological state of being. For Vasudha, "Reclaiming the Sky" means reclaiming the vertical axis of existence. In the domestic sphere, her gaze was forced horizontally (towards duties, people, objects). In her new life, her gaze is allowed to travel vertically. The sky represents the potential for the Atman to expand without encountering a ceiling.

The title, *Seven Steps in the Sky*, suggests that the true marriage—the true Saptapadi—is not between man and woman, but between the individual and the infinite. To take steps "in the sky" is to walk where there is no solid ground of tradition to support you. It requires the courage to float, to be untethered. This terrified the "domesticated" Vasudha, but it liberates the "awakened" Vasudha. The sky offers a space where gender dissolves. The stars do not distinguish between male and female observers. In the vastness of the cosmos, the petty hierarchies of the Vyomesh household are revealed to be insignificant dust.

Vasudha's destination, Anandgram, serves as the concrete manifestation of her liberated spatiality. If Vyomesh's home was a Panopticon,

Anandgram is an "Open Plan." It is a community designed around the principles of shared labor, intellectual freedom, and integration with nature. In Anandgram, the architecture is permeable. The boundaries between "work" and "life", and between "indoors" and "outdoors", are fluid. Vasudha finds that labor here is not Seva (servitude demanded by duty) but Karma Yoga (selfless action performed for the greater good). The kitchen in Anandgram is communal, stripping it of the isolation and hierarchy that plagued the kitchen in her marital home. Here, she cooks not to please a master, but to nourish a community of equals.

The presence of the Himalayas in the final setting is crucial. The mountains, like the sky, represent the sublime—nature in its most sovereign form. Against the backdrop of the Himalayas, the claustrophobia of the urban middle-class apartment evokes a distant, bad memory. The landscape itself participates in Vasudha's healing. The open air, the flowing river, and the vast horizon act as corrections to the enclosed, stagnant air of the domestic sphere. This validates the eco-feminist argument that the liberation of women is intrinsically tied to a reconnection with nature, which patriarchy seeks to dominate just as it seeks to dominate women.

The conclusion of the novel brings the reader back to the motif of the "Seven Steps." In the Hindu marriage rite, the seventh step seals the union, making the couple "friends for life" (Sakha). However, in the context of the novel's trajectory, Vasudha takes a metaphorical seventh step away from the marriage to find friendship with herself. Kapadia suggests that the traditional Saptapadi creates a closed circle of repetitive time (reproduction, maintenance, death). Vasudha's journey breaks this circle and turns it into a straight line—a vector pointing towards self-realization (Swa-dharma). She realizes that a woman is not born to be a "half-body" (Ardhangini) to a man, but a whole universe unto herself.

The reconciliation she finds is not a return to the husband, but a peace with her past. She does not hate Vyomesh; she pities him for being trapped in the very house he thinks he owns. By leaving, she frees herself, but she also exposes the hollowness of his authority. The "seventh step" is thus the step into autonomy. It is the realization that the only person who can grant the "Right of Entry" into a meaningful life is the self.

II. CONCLUSION

Kundanika Kapadia's *Seven Steps in the Sky* remains a landmark text in Indian feminist literature precisely because it engages in a sophisticated critique of spatial politics. Through the journey of Vasudha, the novel demonstrates that the oppression of women is not just legal or social, but fundamentally architectural. The "Home", often eulogized in Indian culture as the temple of the family, is revealed to be a site of sophisticated confinement—a Panopticon where the female body is surveilled, the female intellect is starved, and the female soul is tethered.

This paper has argued that Vasudha's liberation is a fundamentally spatial process. By establishing the home as a hegemonic "inner domain" that systematically erases female subjectivity, the analysis reveals how domestic rituals—from the Saptapadi to the Lakshman Rekha—function as mechanisms of enclosure. Vasudha's trajectory, therefore, requires the construction of an internal "counter-space" of the mind, a necessary precursor to her physical rupture from the domestic sphere. Ultimately, her journey culminates in the reclamation of the "Sky", a metaphor for a limitless, un-gendered ontology that transcends the binary of the gendered home.

The "Right of Entry" that Vasudha ultimately secures is not an entry into another man's house, nor a return to her father's house. It is the right to enter the world as a sovereign entity. It is the right to stand under the open sky without a roof filtering the light. Kapadia's novel asserts that for the Indian woman, the path to the sky does not lie in the seven steps around the fire, but in the steps taken away from it, towards the horizon of her own potential. In doing so, Vasudha redefines the geography of womanhood from a fixed point on a domestic map to a fluid motion across an open sky.

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