

2026:1e

Sida Evaluation

Nordic Consulting Group A/S

Evaluation of Sida's Zambia Portfolio

An analysis of Zambia's portfolio as part of the Central Evaluation of Sida's work with Poverty



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The views and interpretations expressed in this report are the authors' and do not necessarily reflect those of the Swedish International Development Cooperation Agency, Sida.

Sida Evaluation 2026:1e

Commissioned by Sida, Evaluation Unit.

Published by: Sida, 2026

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Date of final report: 2025-12-10

Art.no.: Sida62852en

urn:nbn:se:sida-62852en

This publication can be downloaded/ordered from www.Sida.se/publications

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Abbreviations and acronyms

| | |
|-----------------|---|
| BGFA | Beyond the Grid Fund Africa |
| BGFZ | Beyond the Grid Fund Zambia |
| CDSS | Community Development Support Services |
| CIVSAM | Framework contract with Swedish NGO |
| CSE | Comprehensive Sexual Education |
| CSO | Civil Society Organisation |
| DFID | Department for International Development |
| DWA | District Women's Associations |
| FBO | Faith Based Organisations |
| GoS | Government of Sweden |
| GPOBA | Global Partnership for Results-Based Approaches |
| GRZ | Government of the Republic of Zambia |
| IAPRI | Indaba Agricultural Policy Research Institute |
| IDA | International Development Association |
| ILO | International Labour Organisation |
| INCREASE | Increasing Resilience in Energy and Agriculture Systems and Entrepreneurship |
| KAPAME Strategy | Strategy for capacity development, partnership and methods that support the 2030 Agenda for sustainable development |
| LGBTI | Lesbian, Gay, Bisexual, Transgender and Intersex |
| MDG | Millennium Development Goal |
| MDPA | Multidimensional Poverty Analysis |
| MOH | Ministry of Health |
| MTR | Mid-Term Review |
| NGO | Non-Governmental Organisation |
| NGOCC | Non-Governmental Gender Organisations' Coordinating Council |
| NLACW | National Legal Aid Clinic for Women |
| OVP | Office of the Vice President |
| SAP | Strengthened Accountability Programme |
| SCT | Social Cash Transfer |
| SDG | Sustainable Development Goal |
| SEK | Swedish Kroner |
| SPO | Strategic Partner Organisation |
| SRHR | Sexual & Reproductive Health Rights |
| SUN | Scaling Up Nutrition |
| UNDP | United Nations Development Fund |
| UNESCO | United Nations Educational, Scientific and Cultural Organisation. |
| UNICEF | United Nations International Children's Emergency Fund |
| UNJPSPS | United Nations Joint Programme on Social Protection |
| USD | United States Dollars |
| WEE | Women's Economic Empowerment |
| WFP | World Food Programme |

Executive Summary

This report assesses the relevance of Sida's Zambia portfolio across all sectors and strategies in 2019. The assessment constitutes part of a larger *Strategic Evaluation of Sida's Work with Poverty*. In the report, we have analysed statistical data for all 77 contributions and conducted an in-depth document review for the 23 contributions that were above SEK 20 million.

Overall, we found Sida's Zambia portfolio to be relevant, demonstrating a balanced geographic and sectoral distribution in line with stated intentions in the strategy and the multidimensional poverty analysis. Several contributions are implemented in Zambia's poorest provinces and the portfolio explicitly targets women, children and some marginalised groups of particular relevance in the Zambian context. Moreover, the Embassy has taken concrete steps to address identified gaps in the portfolio's targeting of the poor e.g. within agriculture and livelihood interventions. However, the lack of systematic monitoring data on which specific groups are being reached within a broader defined "marginalised" group limits the evidence base.

We found a well-balanced mix of contributions targeting poverty directly and indirectly. We also found contributions explicitly focusing on addressing multidimensional poverty in all its complexity, e.g. through cash transfer which has been highly relevant in the Zambian context. Recent evidence shows that cash transfer has improved food security for the poor but has not had an impact on assets accumulation or income generation due to increasing food prices. While we have identified clear potentials for synergies across strategic areas, it has been a challenge to realise these in practice.

Indirect poverty-reducing interventions, such as developing of agricultural markets and renewable energy access within remote areas, have been supported with the intention to eventually reach the poor. Our findings here suggest that these interventions require longer-term support to effectively benefit the poor.

1 Introduction

This report presents an assessment of the relevance of Sida's 2019 Zambia portfolio.¹ A portfolio is understood as consisting of *all* contributions to Zambia across all sectors and strategies in a given year. The year 2019 was selected for several reasons: i) It was the last year before COVID-19 started; ii) key stakeholders would be expected to still be around available for interviews; and iii) Sida's capabilities may not have changed significantly since then.

The composition of the 2019 portfolio in Zambia was analysed from different perspectives including: i) sector/sub-sector focus; and ii) types of partnerships and modalities (e.g. national and international NGOs, government, UN organisations, private sector actors), as well as contributions that address poverty reduction directly and indirectly and through both long and short results chain. While some of the contributions directly target poor people, others focus on institutional strengthening, with the assumption that such support will eventually facilitate improvements for the poorer segments of society.

The point of departure for the analysis was an overview of all contributions from 2019 provided by Sida's statistical department providing information of all contribution names, sectors, aid modality and strategies for a total commitment of 92 contributions. Some of the contributions cut across several strategies/sectors but in order to have the contributions reflected only once, the list was sorted manually bringing the contributions to 77 contributions. With this large number of contributions, it has not been possible to assess all

Sida defines multidimensional poverty as deprivations within four dimensions - resources, opportunities and choice, power and voice and human security. Sida defines a person living in multidimensional poverty as being resource-poor and poor in one or several of the other dimensions.

Note that this definition is broader than the definition used in for instance OPHI's national multidimensional poverty index (MPI) and the World Bank definition of multidimensional poverty that uses the MPI in combination with monetary poverty.

Source: Sida (2019), Dimensions of Poverty, poverty toolbox.

¹ The assessment is part of the larger *Strategic Evaluation of Sida's Work with Poverty* which was commissioned by Sida in 2023 and is being implemented by Nordic Consulting Group.

contributions within the portfolio. Therefore, a threshold of SEK 20 million was defined in order to narrow down the number of contributions for more in-depth assessment, while still ensuring a good representation of different types of contributions. This resulted in a selection of 23 contributions that have been assessed based on the following types of documents: i) project documents/partner proposals; ii) appraisal reports; iii) Sida's internal programme monitoring (Conclusions of Performance) on a spot check basis; and iv) evaluation reports/progress reports. These assessments identified geographic coverage, target groups, an assessment of their poverty dimension and whether they were direct

Direct poverty reducing interventions target the poor end-beneficiaries directly and impact is expected to materialise in the short-term. *Indirect* interventions work through longer results chains where impact cannot be expected to materialise in the short-term. Rather, indirect interventions aim at supporting creation of preconditions for improvements for the poor.

or indirect poverty interventions. Financial data on commitments, was analysed for all contributions. However, information requiring an in-depth assessment of project documents, such as the distribution of contributions by results areas and types of partners, was only analysed for the selected 23 projects.

Overall, this analysis aims to assess *IF and HOW*, the portfolio is oriented towards people living in poverty. This is done by assessing the geographic distribution of contributions, strategic areas covered, target groups reached compared to stated intentions (e.g. in strategy or poverty analyses). It is important to note, that the assessment primarily serves a *learning purpose* rather than being an accountability exercise.

1.1 OUTLINE OF THE ANALYSIS

After this introduction, Chapter 2 presents the mapping of the portfolio. This includes a presentation of the strategies in Zambia in Section 2.1, and a descriptive mapping of how the contributions are distributed over sectors and partner modalities. In Chapter 3, the relevance of the portfolio is analysed focusing on how the contributions are distributed across strategic areas, to what extent synergies across strategy areas are realised, geographical areas covered, and specific target groups addressed by the Swedish development cooperation.

2 Mapping of the Zambia Portfolio

This section first provides a descriptive mapping of strategies in Zambia in 2019, then a description of the distribution of the portfolio by sectors, followed by a description of the distribution of contributions by strategic areas in the bilateral strategy 2018-2022. Lastly, it describes findings from the mapping on partner modalities.

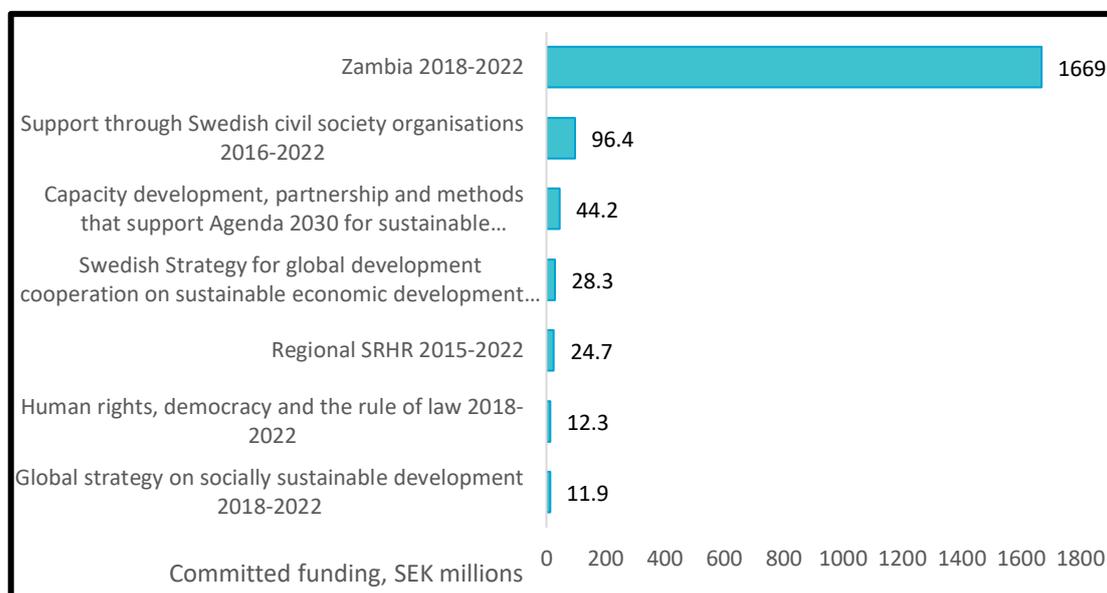
2.1 STRATEGIES IN ZAMBIA 2019

In 2019, 77 contributions funded through a total of 10 strategies were active in Zambia.² Figure 1 lists funding volume for the 77 contributions under the seven main strategies. The vast majority of funding to Zambia has been funded through the bilateral Strategy for Sweden's development cooperation with Zambia 2018-2022 constituting SEK 1.7 billion or 88% of all funds to Zambia. Other active strategies include the Strategy for support via Swedish civil society organisations (CSOs) for the period 2016-2022 under which almost SEK 100 million were channelled to Zambia and the Strategy for capacity development, partnership and methods that support the 2030 Agenda for sustainable development (KAPAME Strategy).

That the Zambia Strategy 2018-2022 is the main strategy for funding in Zambia is also reflected by the fact that out of the 23 selected contributions for in-depth assessment (based on a budget threshold of minimum SEK 20 million) 22 have been funded under the bilateral strategy. Only one contribution was funded under the CSO Strategy: the Framework Agreement with Save the Children Sweden.

² Not counting JPO positions, audits, consultancy contracts for evaluations and e.g. gender support. This does however not correlate with the Strategy Report for 2019 where 67 contributions are mentioned.

Figure 1. Funding volume to Zambia by strategy (all active contributions in 2019)

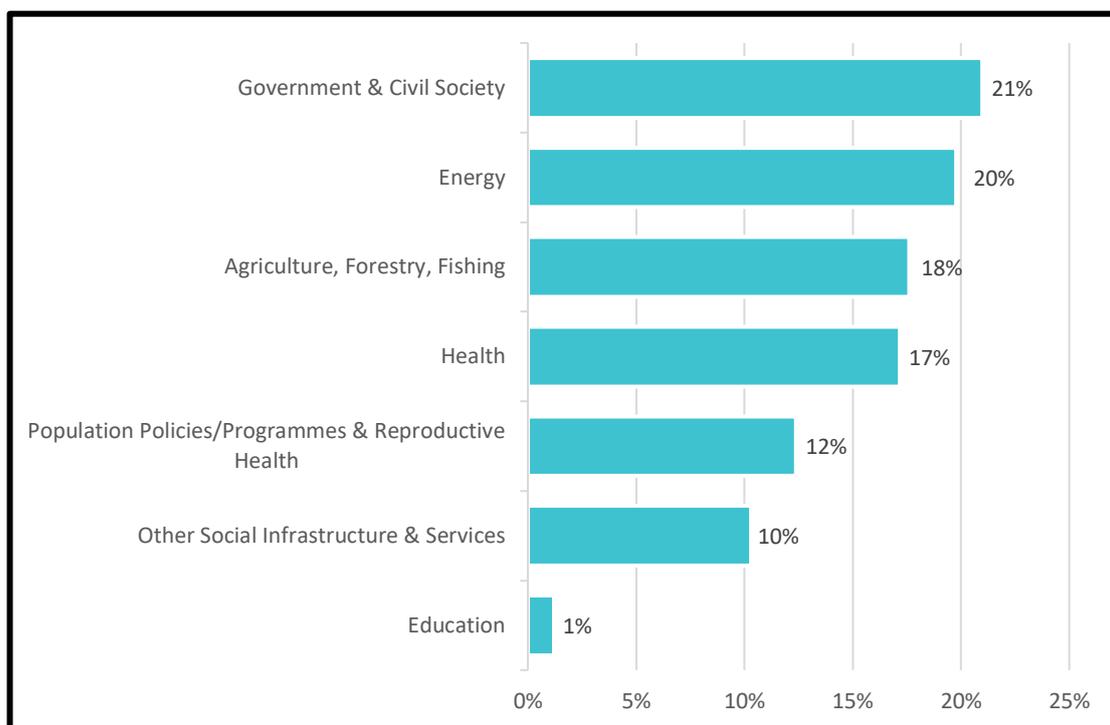


Source: Evaluation team compilation of data from Sida's Statistics office. All figures in SEK.

2.2 PORTFOLIO DISTRIBUTION BY SECTOR

Since most funding is provided under the Zambia Strategy 2018-2022, Figure 2 zooms in on the distribution of committed funds for this strategy active in 2019 (based on Sida's reporting to OECD DAC). As reflected in the figure, the distribution across sectors shows a more or less equal distribution across government and civil society, energy, agriculture, forestry and fishery and health (refer Figure 2).

Figure 2. Commitments for projects active in 2019 under the Zambia Strategy 2018-2022 by sector



Source: Evaluation team compilation of data from Sida's Statistics office.

The 23 Contributions assessed as part of this portfolio analysis included the following:

- The “Government and Civil Society” category includes core and project support to international CSOs focused on governance issues (such as Transparency International Zambia, Diakonia Zambia, Action Aid Zambia) and to national CSOs (such as Non-Governmental Gender Organisations’ Coordinating Council (NGOCC)), as well as government institutions (such as the Office of the Auditor General).
- Support to “Energy” includes primarily the challenge funds for Beyond the Grid for Zambia (BGFZ) and Beyond the Grid for Africa (BGFA).
- Support to “Agriculture, forestry and fishery” concentrates mainly around agriculture through support to the national CSO MUSIKA, Indaba Agricultural Policy Research Institute (IAPRI), We Effect’s Women’s Economic Empowerment (WEE) project and SNV’s Increasing Resilience in Energy and Agriculture Systems and Entrepreneurship (INCREASE).
- The support to “Health” is primarily channelled towards nutrition through United Nations International Children's Emergency Fund (UNICEF) and World Food Programme (WFP) but also to primary health care through the Ministry of Health (MoH).

- Support to “Population policies/programmes and reproductive health” is provided to the international CSO Marie Stopes Zambia and United Nations Educational, Scientific and Cultural Organisation (UNESCO).
- Finally, the category “Other social infrastructure and services” includes the joint UN Capacity Building Social Protection 2019-2024 programme and capacity development of the Central Statistical Office.

2.3 DISTRIBUTION BY STRATEGIC AREA IN THE BILATERAL STRATEGY 2018-2022

The bilateral Strategy with Zambia 2018-2022 identifies three strategic areas for Swedish support, as reflected by Table 2: *Strategic Area 1 on human rights, democracy, the rule of law and gender equality* (in the following “Strategic Area 1 on human rights and democracy“); *Strategic Area 2 on equitable health, SRHR, and nutrition* (in the following “Strategic Area 2 on health, SRHR and nutrition”); and *Strategic Area 3 on environment, climate, renewable energy and sustainable, inclusive economic development and livelihood* (in the following “Strategic Area 3 on environment and livelihood”). A total of 12 result-areas are included in the strategy.

The 23 in-depth contributions under the Strategy with Zambia 2018-2022 has been mapped according to what strategic and results areas have been reflected in the decision documents as the key areas to be addressed by the contributions.³ As reflected in Table 1, most contributions contribute to several results areas (this is why sum in column three and four exceeds the number of contributions). 20 contributions contribute to Strategic Area 1 on human rights and democracy, while 16 contributions contributed to Strategic Area 3 on environment and livelihood (refer also Figure 3 for visual illustration).

Only 11 out of the 23 selected contributions cover Strategic Area 2 on health, SRHR and nutrition. In particular, the Results Area 2.1, that focuses on support to increased and equitable health services, is covered by few contributions. Result Area 2.3 (nutrition) had relatively high coverage, with five out of the 23 selected contributions. However, embassy staff indicated that they do not consider this a priority to continue as a standalone results area under the current Zambia Strategy 2024-2028. Instead, it was suggested that improved nutrition should be integrated into the goals for health, social protection, agriculture and markets to achieve greater impact.⁴

³ When decision documents were unavailable, we relied on appraisals, evaluations, and similar sources. However, it seems that the contributions sometimes address more areas than those specified in the decision documents.

⁴ Embassy of Sweden, Lusaka (2020) Mid-Term Review of Swedish Development Cooperation with Zambia 2018-2022.

Table 1. Distribution of contributions over strategic and results areas

| Strategic Area | Result Area | # of contributions contributing to results areas | # of contributions contributing to strategic areas |
|---|--|--|--|
| 1. Human rights, democracy, the rule of law and gender equality | 1.1 Improved capacity and increased democratic space to promote and strengthen human rights, democracy and the rule of law. | 6 | 20 |
| | 1.2. Increased gender equality, particularly in terms of political participation and economic empowerment. | 5 | |
| | 1.3 Increased social protection for people living in poverty. | 3 | |
| | 1.4 Improved conditions for democratic governance, reduced corruption, increased responsibility and accountability in public institutions. | 5 | |
| | 1.5 Strengthened capacity in public institutions, including capacity to mobilise additional actors and resources for sustainable development. | 1 | |
| 2. Equitable health, SRHR, and nutrition | 2.1 Increased and equitable access to health services, with a focus on women, young people and children. | 2 | 11 |
| | 2.2 Greater access to and respect for SRHR | 4 | |
| | 2.3. Improved nutrition for women, young people and children. | 5 | |
| 3. Environment, climate, renewable energy and sustainable, inclusive economic development and livelihoods | 3.1 Sustainable use of natural resources, increased sustainable productivity and production in agriculture, and increased resilience to climate change. | 4 | 16 |
| | 3.2 Improved opportunities for sustainable livelihoods, with a focus on productive employment with decent working conditions, particularly for women and young people. | 5 | |
| | 3.3 Increased capacity to engage in sustainable trade, access to markets and value chains for small-scale farmers, entrepreneurs and businesses. | 4 | |
| | 3.4 Greater access to renewable energy and improved energy efficiency. | 3 | |

Source: The evaluation team's own mapping of the portfolio based on data from Sida's Statistics office.

2.4 PARTNER MODALITIES

According to the bilateral strategy, national state actors and the government constitute the duty bearers in Zambia who are the main actors responsible for the country's development. While main responsibility lies with the government, especially in social sectors, private sector and civil society are acknowledged in the Multidimensional Poverty Analysis (MDPA) to potentially play a key role in long-term solutions for e.g. the health sector. CSOs and media organisations are also mentioned as watchdogs towards the government in ensuring accountability, human rights, transparency etc. but

it is emphasised that further strengthening is needed to support them play this role more effectively.⁵

According to the Mid-Term Review of Swedish Development Cooperation with Zambia 2018-2022 (2020), Swedish support has gradually shifted away from being mainly focused on state-to-state cooperation, although the government is still identified as the main duty-bearer in the bilateral strategy. Instead, funding is increasingly being channelled through multilateral organisations, international CSOs and Swedish government agencies, mainly as a consequence of corruption issues and a shrinking democratic space.⁶

This tendency is also reflected in Table 2 which shows the distribution of contributions among larger partners in 2019 (the 23 contributions selected for in-depth assessment). Both in terms of number of contributions and funding amounts, the vast majority is channelled through the multilateral system/UN system (around 30%). The two largest contributions for multilateral partners are provided to UNICEF for the Scaling Up Nutrition (SUN) and the Social Protection programme. Both of these have a budget of around SEK 100 million.

Only a few contributions work directly with Zambian government partners. These partners include the Office of the Auditor General, the Central Statistical Office and the MoH, although the support to Central Statistical Office is provided as a support through the Statistics Sweden and is therefore an indirect government support. Within support to health, the MoH contribution is relatively small compared with the support to multilaterals such as UNICEF and WFP. While the contribution with MoH has an accumulative budget over five years of SEK 40 million, UNICEF and WFP receive respectively SEK 91 million and SEK 60 million also for five years periods.

Among the 23 contributions, three are with national CSOs, accounting for 21% of the total funding. Of these three, MUSIKA has received the largest share, with SEK 184 million committed between 2018 and 2024. MUSIKA is a national CSO which is co-owned by six key Zambian agriculture related institutions that started its operations in November 2011 financed by Sweden. From 2012 up to 2016, MUSIKA was co-financed by the Department for International Development (DFID).⁷ Sweden has continued to support MUSIKA until 2023 to support development of pro-poor businesses across the country.

⁵ Embassy of Sweden, Lusaka (2018), Poverty analysis Zambia 2018; Swedish MFA (2018) Strategy for Sweden's development cooperation with Zambia 2018-2022.

⁶ Embassy of Sweden, Lusaka (2020), Mid-Term Review of Swedish Development Cooperation with Zambia 2018-2022.

⁷ Sida (2017), Decision on Appraisal on MUSIKA Development Initiatives.

Table 2. Type of partners in 2019

| Type of partner | # of 23 contributions | % | Committed funds (SEK millions) | % |
|--------------------|-----------------------|------------|--------------------------------|------------|
| National CSOs | 3 | 13% | 280,5 | 21% |
| International CSOs | 7 | 30% | 232 | 17% |
| Government | 3 | 13% | 121,5 | 9% |
| Multilateral | 7 | 30% | 450 | 33% |
| Challenge fund | 2 | 9% | 221 | 16% |
| Academic | 1 | 4% | 46,5 | 3% |
| Total | 23 | 99% | 1,351,5 | 99% |

Source: Evaluation team's mapping of the portfolio based on data from Sida's Statistics office.

The support to IAPRI provides another example of an initial Sida-funded project that later evolved into a national academic institution. IAPRI was initiated in 1999 as a research project funded by Sida and USAID but was in 2011 established as a not-for-profit private Zambian company.⁸ The support to IAPRI is also illustrative for how Sida has supported different types of partners within agriculture. It was a strategic decision to support evidence-based policy development and dialogue through IAPRI in order to supplement agriculture support provided directly to small scale farmers such as SNV's INCREASE Project. The We Effect led WEE Project specifically targeted vulnerable groups in the agriculture sector, including female headed households and people living with a disability or HIV/AIDS since these groups, according to interviews with Sida staff, were not sufficiently included in e.g. the INCREASE Project and other agriculture interventions.

The bilateral strategy emphasises innovative forms of financing and mobilisation of financial resources. In this regard, the contributions concerned with energy provide the best example of how this strategic priority has been implemented. The establishment of challenge funds for scaling renewable energy solutions such as BGFZ and BGFA constitute good examples and a key indicator of BGFZ and BGFA progress is resource mobilisation. Also, the Global Partnership for Results-Based Approaches (GPOBA)/International Development Association (IDA) Electricity Services Access Project has a focus on engaging of private sector in innovative ways to provide energy connections based on a results-based financing mechanism.⁹

⁸ Sida (2018), IAPRI Phase II Decision Document.

⁹ Sida (2018) Decision on Connection Subsidies/GPOBA Phase 2

3 Relevance of the portfolio

Following a mapping of the portfolio this Chapter analyses the relevance of the portfolio. First it analyses synergies across strategy areas, then an analysis of direct versus indirect poverty contributions, then the geographic distribution of contributions is discussed before turning to the target groups addressed in the portfolio. A short conclusion on relevance will be provided under each section.

3.1 SYNERGIES ACROSS STRATEGY AREAS

Synergies across strategies and within strategy areas have long been a dedicated strategy for Swedish development cooperation in order to enhance efficiency and ensure a more integrated approach.¹⁰ This section therefore assesses how synergies across areas have been ensured.

The mapping of contributions across strategy areas is illustrated in Figure 3. The Save the Children Contribution is the only contribution that cuts across all strategic areas, although main emphasis is on Strategic Area 1 and 2 promoting children's rights, civic education and enhanced health and nutrition for children through CSO mobilisation.

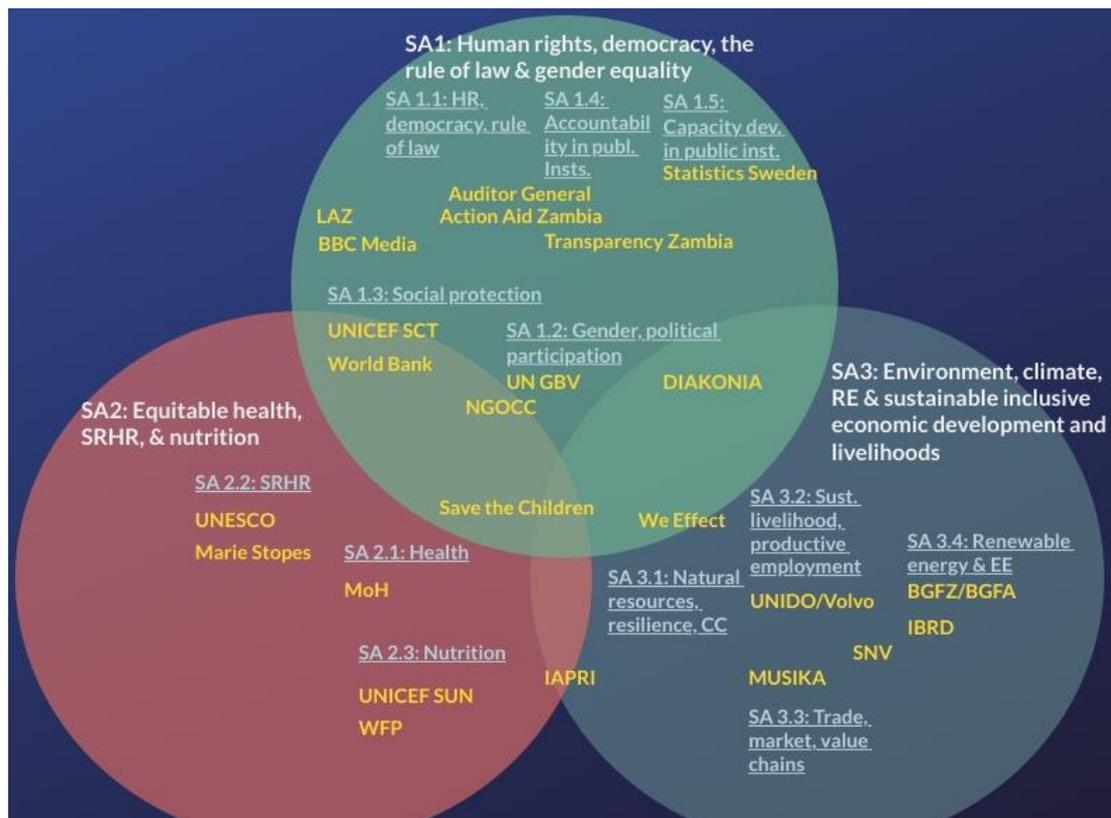
The Strengthening Accountability Programme (SAP) II implemented by Diakonia provides a good example of a contribution that contributes both to Strategic Area 1 on human rights and democracy and Strategic Area 3 on environment and livelihood with an emphasis on productive employment for women and youth (Result Area 3). This is done through a dual focus which, on the one hand, includes rural community members' labour rights within extractive industries while, on the other hand, support advocating towards duty-bearers to ensure higher benefits and involvement of communities near mining sites.

We Effect's WEE project also cuts across Strategic Area 1 on human rights and democracy and 3 on environment and livelihood by, on the one hand, providing capacity building for District Women's Associations (DWAs) to organise female smallholder farmers for enhanced agricultural production and livestock rearing while, at the same time providing training on gender equality and establishing mechanisms for prevention of gender-based violence (GBV). The external evaluation of the project

¹⁰ See for instance guiding documents for Swedish development cooperation "Guidance Note: Theory of Change", 2021; Sida (2020), External Evaluation of the Swedish Cooperation Strategy with Bolivia 2016-2020.

did however find that while the project was designed to ensure synergies across gender equality, agricultural productivity and environment the different elements of the project were often implemented in silos and not all beneficiaries received training in all elements and therefore the synergy was not always ensured in practice. For instance, environmental achievements were reduced to a few tree planting activities.¹¹ This was also the case with the SAP project implemented by Diakonia, thus in practice the synergies were not so visible (see case study on Diakonia).

Figure 3. Mapping of portfolio across strategy areas



Source: Evaluation team’s mapping of the portfolio based on data from Sida’s Statistics office and review of project documents. The green circle represents Strategic Area 1 on human rights and democracy, the red circle represents Strategic Area 2 on health and SRHR while the grey circle represents Strategy Area 3 on environment and livelihoods. The strategic areas are included in the white text in the figure while results areas are written in light blue. Eight of the contributions falls within two or more strategic areas.

The UN Capacity Building Social Protection 2019-2024 programme, led by UNICEF, has a dedicated poverty reduction mandate by selecting vulnerable and female headed households for monthly cash transfers. While this contribution mainly falls within the results area on social protection under Strategy Area 1 on human rights and democracy there is also a strong focus on building capacity for a single window cash transfer that allows for Cash Transfer + interventions where cash transfers are directly linked to

¹¹ NCG (2023), Mid-Term Evaluation of the Women Economic Empowerment Project in Zambia, 2023.

nutrition, health and education interventions.¹² As reflected by the case study on this specific contribution the intervention has been highly successful in targeting the poorest segments and districts in Zambia.

In conclusion, the portfolio has achieved synergies across strategic areas, with a strong focus on targeting women, children, and poorer segments. However, realising these synergies has often been challenging in practice. That said, this section has not provided any strong evidence to question the overall relevance of the portfolio.

3.2 DIRECT VERSUS INDIRECT POVERTY IMPACT

Contributions can either target people living in poverty directly, or indirectly. Indirect poverty reducing contributions work through long results chains. Impact cannot be expected to materialise in the short-term. Rather they support creation of preconditions for improvements for the poor. Direct interventions target directly the poor end-beneficiaries with improvements. Since indirect and direct contributions work so differently, we analyse their relevance separately.

According to the Embassy's own portfolio mapping of contributions as direct or indirect poverty reducing, 60% of the contributions reached people living in poverty directly whereas 40% reached them indirectly.¹³ Examples of direct contributions include contributions within social protection, health and savings groups. Indirect interventions include policy and institutional support.

The portfolio analysis conducted as part of the poverty evaluation confirms an equal distribution of contributions with an indirect and direct poverty impact. 12 contributions target poverty directly while 11 contributions indirectly. Table 3 illustrates the distribution of direct and indirect poverty interventions for the selected 23 in-depth contributions by type of partners. Indirect poverty interventions are distributed very evenly across types of partners. Direct poverty interventions are more unequally distributed with multilateral organisation and international CSOs as the main partners. National organisations account for an equal number of contributions within both direct and indirect interventions while the majority of the contribution with multilateral organisations are direct interventions.

¹² E.g. Institute of Development Studies and UNICEF (2023), Evidence Generation from the Gender and Nutrition Sensitive 1,000 Days in Social Cash Transfer Pilot, Baseline Report.

¹³ Embassy of Sweden, Lusaka (2020) Mid-Term Review of Swedish Development Cooperation with Zambia 2018-2022.

Table 3. Direct and indirect poverty interventions by type of partner

| Type of partner | Direct poverty | | Indirect poverty | |
|------------------------|----------------|-------------|------------------|----------------|
| | # | % of direct | # | % of indirect* |
| National CSOs/academia | 2 | 17 | 2 | 18 |
| International CSOs | 4 | 33 | 3 | 27 |
| Government | 1 | 8 | 2 | 18 |
| Multilateral | 5 | 42 | 2 | 18 |
| Challenge funds | | | 2 | 18 |
| Total | 12 | 100 | 11 | 99 |

*Rounded off

Source: Evaluation team's mapping of the portfolio based on review of project documents.

3.2.1 Contributions with an indirect poverty impact

Examples of contributions with an indirect poverty impact include capacity development of public institutions such as the Office of the Auditor General and Statistics within Strategic Area 1 on human rights and democracy. For MUSIKA, and BGFZ/BGFA under Strategic Area 3 on environment and livelihoods actual poverty impact is assumed to occur in the longer run and the support to poverty is therefore indirect. Under Strategic Area 2 on health and SRHR, almost all contributions (except IAPRI) fall under direct poverty impact since they focus on service provision within nutrition, SRHR and health or on sexual education targeting young people to prevent teenage pregnancies and sexually transmitted diseases etc. (UNESCO).

Contributions with an indirect impact on poverty reduction typically build on several assumptions that need to be fulfilled in order for the impact to be achieved. Thus, while a contribution can have an impact on an institution's capacity to better deliver reliable results, it still comes down to e.g. political will to e.g. implement recommendations. For instance, an evaluation of the support to the Office of the Auditor General¹⁴ indicates that even if the overall objective of the support to "making a difference in the lives of citizens by contributing to increased accountability in public service delivery" is indeed relevant, the actual impact is hampered by lack of political will to follow up on audits.

Similarly, the support to renewable energy (BGFZ) and agriculture (MUSIKA), which targets private sector development to enhance pro-poor solutions, is intended to reach the poor in the medium to longer run. However, there are indications that this does not always occur as it is too expensive for companies to reach hard to reach areas, even

¹⁴ Sida (2021), Evaluation of the Office of the Auditor General Zambia Strategic Plan/Restructuring and Institutional Development Project (RIDP VI), Niras Sweden, 2021.

when subsidised.¹⁵ At least there is a need to define clearly whom is expected to be reached by such interventions and whom may potentially be left out. For instance, an impact assessment of BGFZ indicates that 37% of the energy customers reached live below the \$3.20 per person per day poverty line which is a much lower proportion than in the population as a whole, where 60% live below this line.¹⁶ While the intention of BGFZ was not to reach the poorest segments but rather to foster economic growth in the longer run, there was still an assumption that poor people would get access to renewable energy as the market developed. It is too soon to assess whether this has occurred but without defined targets in the contribution it is difficult to assess whether the outreach has been “good enough”. Also, interviews conducted with BGFZ energy service providers (companies) as part of the Evaluation of the Power Africa Project at Sida indicated that the business case for them to further expand to rural areas would be less evident without subsidies.¹⁷

3.2.2 Direct poverty impact

As mentioned above, the direct poverty interventions are dominated by the multilateral organisations that also receive the largest share of funds (refer Table 2). The largest of these is the joint UN Capacity Building Social Protection 2019-2024 with a committed SEK122 million that focus primarily on resource poverty. The project has an explicit target of addressing multidimensionally poverty through cash transfers. According to annual reports from 2021 and 2022 the number of households benefiting from cash transfers has continued to increase and in 2022 it increased from 887,759 households to 1,027,000 households from all 116 districts across the country. According to Sida staff, this had again increased to 1,3 million people in 2024.

In 2021, the value of cash transfers was increased from ZMW 300 to ZMW 400 for households with persons with severe disabilities, and from ZMW 150 to ZMW 200 for households without.¹⁸ According to documents reviewed¹⁹ and interviews with Sida staff and UNICEF, Sweden advocated for an increase of the value during several years and it was therefore considered a key achievement when the value was increased.

While impact on these households still needs to be further analysed, the outreach of the programme has been immense. The case study conducted as part of this evaluation indicate that the programme has had an impressive targeting of very poor segments of

¹⁵ Sida (2021), The Power Africa Project at Sida: Innovative investment mobilisation for fossil-free electrification. A Mid-Term Evaluation 2015-2019.

¹⁶ 60 Decibels (2021), Beyond the Grid Fund Zambia. Energy Service Subscription Verification & Customer Insights.

¹⁷ Sida (2020), The Power Africa Project at Sida: Innovative investment mobilisation for fossil-free electrification. A Mid-Term Evaluation 2015-2019.

¹⁸ The Government of the Republic of Zambia (GRZ)-United Nations Joint Programme on Social Protection in Zambia (UNJPSP II) 2021 and 2022 Annual Progress Reports

¹⁹ GoZ-United Nations (2023) Second Joint Programme on Social Protection 2019-2022 “UNJPSP-II”, Annual Report 2022, May 2023.

the population that has improved their food security through cash transfers but also that the cash does not necessarily lead to enhanced assets and improved income generation. While this is expected to benefit children of the targeted households in the short run it is more difficult to ensure sustainable results in the long run.

The UNESCO contribution ‘Our Rights, Our Lives, Our Future Zambia’ promotes comprehensive sexual education in schools to prevent teenage marriages. This is also a direct poverty reducing intervention that addresses Sida’s opportunity and choice poverty dimensions. According to an evaluation from 2023,²⁰ this contribution has achieved good progress on institutionalising comprehensive sexual education in teacher education. The programme is implemented in 33 countries in Sub-Saharan Africa and in the final evaluation from 2023, Zambia was highlighted as the country where teachers are best capable of articulating the various aspects of comprehensive sexual education (e.g. on how it is an important element of SRHR). While the evaluation report indicates that adolescent mothers are increasingly re-entering school after giving birth in Zambia, it does not present impact on teenage pregnancies rates in Zambia.²¹ Results from the ongoing DHS survey from 2024 however do indicate that teenage pregnancies have been reduced, although it is not possible to link this development to the intervention. Nevertheless, there are other studies indicating a strong correlation between comprehensive sexual education in schools and reduced early pregnancies among school children.²²

Support to the *human security* dimension is primarily covered by the UN Government of Zambia Joint Programme on GBV II but also through the Support to the National Legal Aid Clinic for Women (NLACW) that also has an explicit aim of combating GBV. Thus, modalities include both a multilateral organisation and a national CSOs receiving core support to provide legal aid services to women and children.

The portfolio has balanced its interventions to include an equal number of contributions that targets the poor directly and contributions that do so indirectly. There is evidence that direct poverty interventions, such as the social cash transfer, indeed reach the very poor in Zambia, contributing to better food security and nutrition for children. However, it is difficult to prove that such support is sustainable. Indirect poverty interventions are challenged by documenting that poor people benefit in the long run and there are examples where interventions assume that support will benefit poorer segments but in the shorter run, they primarily reach slightly better off segments.

²⁰ UNESCO (2023), Our Rights, Our Lives, Our Future (O3) Programme, Final Evaluation Report, February 2023.

²¹ UNESCO (2023), Our Rights, Our Lives, Our Future (O3) Programme, Final Evaluation Report, February 2023.

²² BMC Public Health (2023) Comprehensive sexuality education linked to sexual and reproductive health services reduces early and unintended pregnancies among in-school adolescent girls in Zambia, February 2023.

There is no strong evidence indicating low poverty relevance for either direct or indirect contributions. At the same time, we only have evidence of high poverty relevance for some contributions, whereas the relevance of others is harder to assess.

3.3 GEOGRAPHIC DISTRIBUTION

Poverty in Zambia is a rural phenomenon with poverty levels of 77% in rural areas compared to 23% in urban areas, reflected in Table 4.

Table 4. Multidimensional poverty index and LCMS data on poverty (2015 and 2022)

| | Severe MPI poverty | MPI poverty | Consumption poverty (2015) | Consumption poverty (2022) | Share of the population |
|-----------------|--------------------|-------------|----------------------------|----------------------------|-------------------------|
| Urban | 6 | 21 | 23 | 32 | 40 |
| Rural | 31 | 66 | 77 | 79 | 60 |
| National | 21 | 48 | 54 | 60 | 100 |

MPI = multidimensional poverty index (health, education, resources). Sources for Consumption poverty: LCMS 2022, figure 12.1.

Sources for rest: OPHI (2024), Table 1.

Both the bilateral strategy and the MDPA highlight this, and it is also reflected in the Mid-Term Review (MTR) of Swedish Development Cooperation in Zambia from 2020²³ where rural poverty is highlighted to be the main challenge. The MTR does however note, that income poverty is increasing fastest in urban areas. According to the MTR, 51% of Swedish contributions reached people in both rural and urban areas, 37% reached people only in rural areas and 12% reached people only in urban areas.²⁴ This is in line with findings from this portfolio analysis which shows that Sweden has a strong coverage of contributions targeting rural Zambia and few contributions with an exclusive urban mandate. Actually, several contributions actively exclude urban areas from their focus - for example, certain renewable energy projects, such as BGFZ, which target only semi-urban areas.²⁵

A number of Sida's decision document on contributions do not explicitly specify whether the contribution targets rural or urban areas. This is not a specific requirement in the Sida contribution system to reflect upon, thus it is sometimes difficult to know

²³ Embassy of Sweden, Lusaka (2020) Mid-Term Review of Swedish Development Cooperation with Zambia 2018-2022.

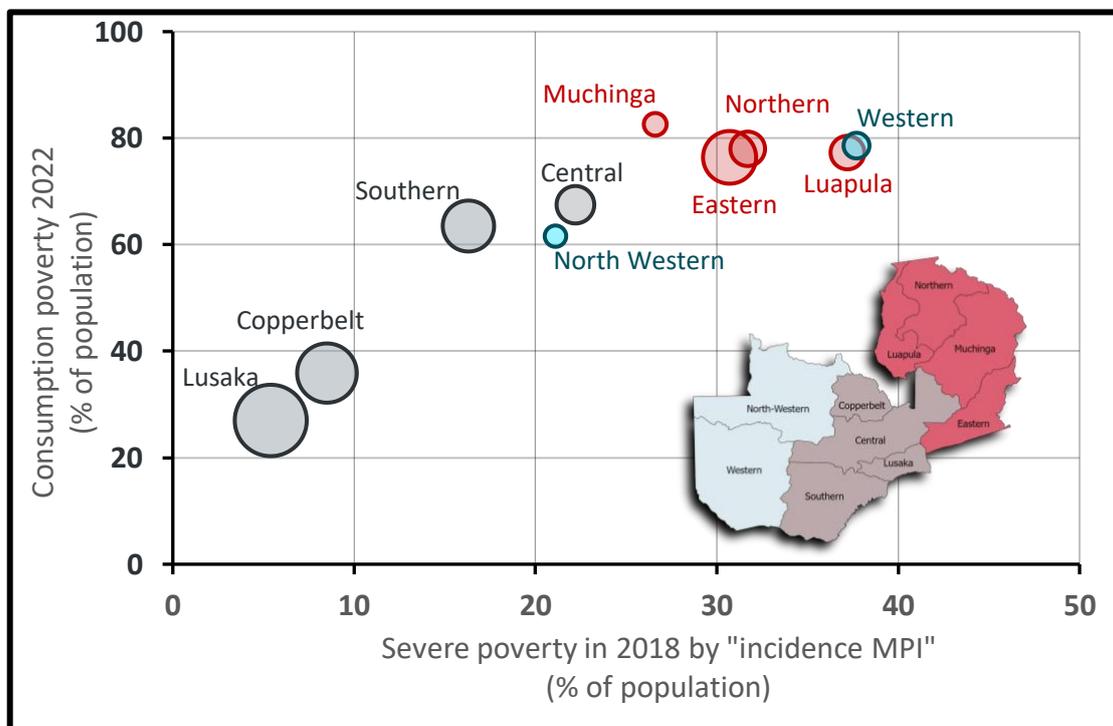
²⁴ Ibid.

²⁵ Sida (2021), The Power Africa Project at Sida: Innovative investment mobilisation for fossil-free electrification. A Mid-Term Evaluation 2015-2019.

whether a contribution targets rural or urban areas. Decision documents tend to reflect upon which provinces are targeted, if not nationally implemented.

One key approach applied by Sweden to address rural poverty has been to provide support to Faith-Based Organisations such as Diakonia and partners since they have a strong presence and network in rural areas, including in remote areas. The Diakonia contribution is implemented in Luapula, North-Western, Copperbelt and Southern Provinces and as reflected in Figure 4 and 5 the provinces with the highest poverty rates include Luapula and North-Western while e.g. the Copperbelt and Southern Province are more affluent but have high numbers of extractive industries, thus justifying the selection of these provinces for this contribution.

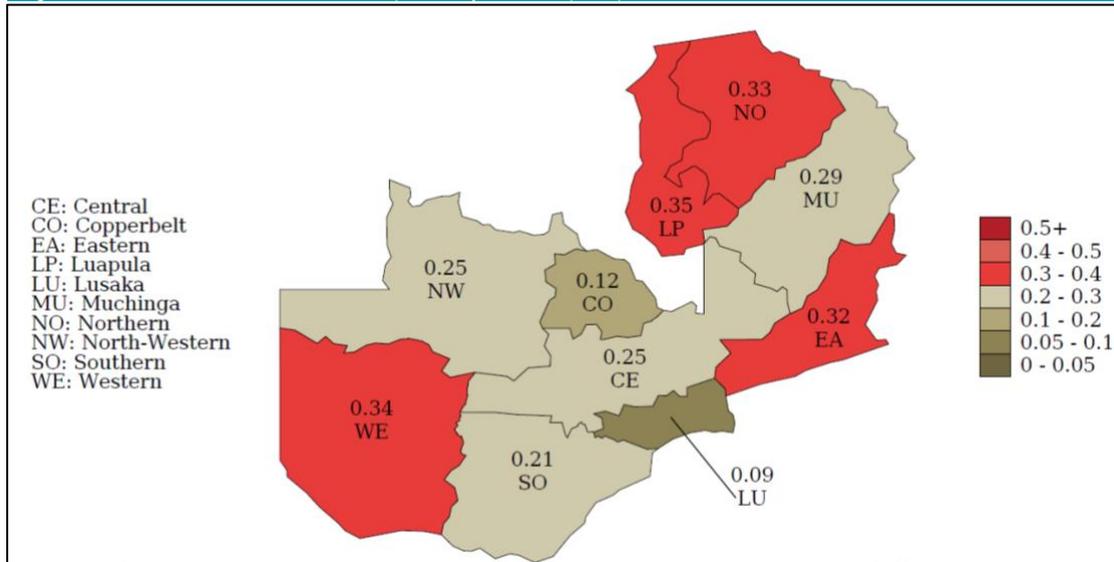
Figure 4. Provincial poverty prevalence



Provincial poverty prevalence by two measurements. MPI = multidimensional poverty index (health, education, resources). The size of the bubble indicates the population size. Provinces in the west of the country are coloured blue, those in the center grey and east red.

Sources: Severe poverty in 2018: OPHI (2024), table 2. Consumption poverty: LCMS 2022, figure 12.3.

Figure 5. Multidimensional poverty index per province based on the 2018 DHS



Source: OPHI (2024). The multidimensional poverty index is based on indicators for health, education and resources. A higher index indicates more intense poverty.

The Zambia MDPA from 2018 identifies Luapula as the province with the highest poverty rates and this was still the case in 2021 when the MTR was conducted.²⁶ Also, Eastern, Western and North Western Provinces are listed as the provinces with the highest poverty incidences in 2021.²⁷ It is noted from the portfolio analysis, that Sweden has a quite strong presence in all these three provinces and several contributions are implemented there. This includes contributions within both Strategic Area 2 and 3 on health and agriculture/environment SNV's INCREASE, We Effect's WEE, MUSIKA, TechnoServe, UNESCO, UNICEF's SUN and to MoH on health support for women, children and youth in Zambia but also some contributions under Strategic Area 1 such as UNDP's UN Government of Zambia Joint Programme on GBV II.

There is no obvious evidence indicating that the geographic distribution is not relevant. Rather, several contributions are implemented in provinces identified as the poorest provinces. However, several interventions do not specify geographic coverage making this assessment difficult to fully grasp.

3.4 TARGET GROUPS

The bilateral strategy for Zambia emphasises a poverty and rights perspective in terms of target groups, and it is explicitly mentioned that all people regardless of gender, age,

²⁶ Embassy of Sweden, Lusaka (2018) Poverty analysis Zambia 2018.

²⁷ Embassy of Sweden, Lusaka (2020) Mid-Term Review of Swedish Development Cooperation with Zambia 2018-2022.

disability, ethnicity, religion or other belief, sexual orientation, or transgender identity or expression such as lesbian, gay, bisexual, transgender and intersex (LGBTI), are explicitly included as target groups. Gender equality is highlighted, and women and girls are emphasised as a specific target group, not least for health services, GBV and SRHR interventions. According to the Embassy's own portfolio assessment in 2020, 40% of contributions were targeted explicitly towards women, while 60% were targeted towards both men and women.²⁸

The current portfolio analysis found that “women and girls” constitute a key target group cutting across most contributions, especially within Strategic Area 1 on human rights and democracy and Strategic Area 2 on health and SRHR. SRHR and nutrition contributions are specifically targeting women, girls and children. These include the WFP Promoting Production and Consumption of Nutritious Foods in Zambia and the UN Capacity Building Social Protection 2019-2024 programme. Social protection programmes, in addition to targeting women and children, explicitly focus on reaching extremely poor households, including individuals with disabilities or chronic illnesses - a goal that has been successfully implemented in practice (see the case study report for this contribution). In 2022, a total of 138,113 households - representing 13% of the total number of households covered by the social cash transfer programme - were households with at least one member living with a disability.²⁹ Thus, the target of 10% was achieved beyond expectations, however with great variations across provinces and with most receivers in Lusaka (27%).³⁰

Within Strategic Area 3 on environment and livelihood, the Embassy in its own assessment identified a gap in reaching women and vulnerable groups through the agriculture support programmes. While there were several agriculture projects targeting small-scale farmers e.g. INCREASE and MUSIKA, there has not been a dedicated focus on women and more vulnerable groups. This was also reflected in the Strategy Report for 2019 where it was recognised that women and vulnerable groups were not fully reached. The WEE project was initiated by the Swedish Embassy with a particular aim to fill this gap. The WEE project had an explicit focus on small-scale farmers with an emphasis on widows, single women, female headed families, youth and people living with a disability or HIV/AIDS. The Embassy suggested several partners to join forces to develop a women's economic empowerment project that focused on some of the most vulnerable women. The mid-term evaluation of WEE indicates that while women, including widows and female headed households, were indeed targeted and included in the project interventions, the lack of systematic data on

²⁸ Embassy of Sweden, Lusaka (2020) Mid-Term Review of Swedish Development Cooperation with Zambia 2018-2022.

²⁹ The Government of the Republic of Zambia (GRZ)-United Nations Joint Programme on Social Protection in Zambia (UNJPSP II) 2022 Annual Progress Reports.

³⁰ Ibid.

how many within the specified target groups were reached challenged the claim that all these vulnerable groups were reached through the supported interventions.³¹

It is noted, that in the 23 specific contributions covered more in-depth by this portfolio analysis, there are no specific contributions targeting the LGBTQI community directly. There are contributions addressing GBV (e.g. UNDP), comprehensive sexual education (UNESCO) and people living with HIV/AIDS where there could be some potential overlaps but there are no contributions explicitly targeting this group among the 23 largest contributions. According to the Strategy Report for 2019 this target group is addressed under the Regional SRHR Strategy, however it is not fully clear which specific contribution is referred to here.

In conclusion, the portfolio targets women and children and some more vulnerable groups which is relevant in the *Zambian* context. Initiatives have been taken to minimise identified gaps in the portfolio's targeting e.g. within Strategic Area 3 on environment and livelihood. However, the lack of systematic monitoring data on which specific groups are reached within this broader defined group is limiting the evidence base.

³¹ NCG (2023), Mid-Term Evaluation of the Women Economic Empowerment Project in Zambia, 2023.

Evaluation of Sida's Zambia Portfolio

Main evaluation method: analysis of data for all 77 contributions and an in-depth document review for the 23 contributions above SEK 20 million.

Positives: The portfolio had a balanced geographic and sectoral distribution, with several contributions in Zambia's poorest provinces. It explicitly targets women, children and some marginalised groups of particular relevance in the Zambian context.

The Embassy has taken concrete steps to address identified gaps in the portfolio's targeting of the poor e.g. within agriculture and livelihood interventions.

Direct and indirect targeting of poverty was well-balanced. Some contributions explicitly addressed multidimensional poverty, e.g. through cash transfer. These improved food security of the poor, but have not had an impact on assets accumulation or income generation due to increasing food prices.

Potential shortcomings: While potential for synergies across strategic areas exists, these are challenging to realise. Indirect poverty-reducing interventions (e.g. developing agricultural markets and renewable energy in remote areas) require longer-term support to effectively benefit the poor.

The lack of systematic monitoring data on which specific groups are being reached within a broader defined "marginalised" group limits the evidence base.



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