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**Populism in power: public policy in
Zambia under President Michael Sata
and the Patriotic Front government**

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Abstract

Michael Sata and the Patriotic Front effectively used populist strategies to assume state power in Zambia. What did Sata's populism mean for his government's economic management? This paper argues that beyond using populism as a mobilization strategy to win elections, Sata also implemented policies that were consistent with macroeconomic populism to fulfill his election promises and reward his supporters. Sata was less focused on maintaining long-term macroeconomic stability than his immediate predecessors and more reliant than them on external borrowing to implement his reform agenda that focused on infrastructure development. Yet Zambians evaluated Sata's presidency more positively than they did his predecessor (even though the evaluations had begun to decline by his final year in office). A broader argument this paper makes is that Sata's populist discourse was rooted in his belief in strong state intervention and attempts to recreate the statist development model that was implemented in Zambia in the 1960s and 70s – but that also led to economic collapse by the 1980s.

1. Introduction

Zambia is among a dozen or so African countries to have witnessed at least two electoral turnovers since the emergence of multiparty democracy in the early 1990s (Bleck & van de Walle, 2018: 75-76). It has experienced two turnovers, with the most recent occurring in 2011 when Rupiah Banda, who led the Movement for Multiparty Democracy (MMD), was defeated by Michael Sata of the Patriotic Front (PF).¹ Although Sata won the presidency after contesting four elections, he gained substantial scholarly attention during the mid-2000s when his party won control of urban constituencies in the 2006 elections (Larmer & Fraser, 2007; Resnick, 2010). In his path to power, Sata mobilized poor urban informal economy workers and brought their grievances into national political debates,

¹ The first turnover in Zambia occurred in 1991, when Kenneth Kaunda – president since independence in 1964 – was defeated by Fredrick Chiluba of the MMD.

using strategies that have been defined as populist or ethno-populist² (Larmer & Fraser, 2007; Resnick, 2010; Helle & Rakner, 2012; Resnick, 2014; Cheeseman & Larmer, 2015; Sishuwa, 2016). The debates on Sata and populism suggest that he shared characteristics with other prominent populist leaders such as Bolivia's Evo Morales and Venezuela's Hugo Chávez (Cheeseman, Ford & Simutanyi, 2014: 339).

The term 'populism' is highly contested and subject to different interpretations. This paper adopts the definition of populism proposed by Ernesto Laclau, which Larmer and Fraser (2007), Sishuwa (2016) and Fraser (2017) also adopted in their instructive analyses of Sata. Laclau described populism as a particular logic of articulating demands that have not found expression within the existing political framework (Laclau, 2005: 33-35). Also relevant for this paper is the definition of populism provided by Resnick (2010; 2014), which she used to describe Sata and other African populist leaders, including Kenya's Raila Odinga, Senegal's Abdoulaye Wade, and South Africa's Jacob Zuma. For Resnick, the term 'populism' is used to describe political strategies rather than political parties per se. She defined populist strategies as 'a mode of mobilization characterized by an anti-elitist political discourse that aims to rectify the exclusion of economically marginalized constituencies' (Resnick, 2010: 1).

Sata's populist discourse resonated with urban voters, particularly slum dwellers, informal economy workers (such as bus drivers, street vendors and market traders), the unemployed, and the youth, who felt excluded by the MMD's neoliberal economic policies (Larmer & Fraser, 2007; Resnick, 2014; Sishuwa, 2016). He intimated that there was a corrupt alliance between leaders in the MMD government and foreign businesses. These 'powerful' elites, he argued, were frustrating the demands of poor Zambians. Sata promised to be more interventionist than the MMD and to reduce the role of foreign investors if elected (Larmer & Fraser, 2007; Resnick, 2014; Sishuwa, 2016). Sata also associated himself with popular concerns such as poor health and safety standards in Chinese owned mines, a shortage of market stalls for informal traders, inadequate urban housing, and disorganized bus stations (Larmer & Fraser, 2007: 614). These concerns were rooted in a perception among Zambians that the 'corrupt' elite and foreign investors were the major beneficiaries of economic growth. He promised to prioritize Zambians by promoting reforms that ensured that 'Zambia was for Zambians' (Larmer & Fraser, 2007: 627).

² Cheeseman and Larmer used the term 'ethno-populism' to refer to electoral appeals that combine an ethnic strategy targeted at rural co-ethnics, and a populist strategy, targeted at urban voters. Sata combined a strategy that targeted his co-ethnic Bemba speakers in the north of Zambia (i.e., Luapula, Muchinga and Northern provinces) and a populist strategy targeted at urban voters in Copperbelt and Lusaka provinces.

Furthermore, Sata's appeal to voters rested partly on historical memory. He emphasized his 'success' as District Governor of Lusaka in the 1980s and as minister in the 1990s – including of Local Government and Housing (Larmer & Fraser, 2007; Resnick, 2014). His record in these positions included the construction of flyover bridges and low-cost housing projects which made him popular with the burgeoning urban population (Sishuwa, 2016; Scott, 2019). During his presidential election campaigns, Sata attributed the success of the projects to himself – rather than the state – and generated an image of himself as a 'Man of Action' who was best suited to solve Zambia's economic challenges (Sishuwa, 2016: 92).

While there is a consensus that Sata's electoral strategies during the 2000s can be classified as 'populist,' the implications of his populist mobilization strategies for his presidency merit further attention. How did Sata's populism inform public policy? Did the PF's discourse of populism change when the party formed government? How did PF differ from its predecessors in terms of economic management? Did the PF, in either vision or practice, have a broader vision of development?

This paper considers the implications of Sata's populist mobilization strategies for public policy during his three-year presidency and makes three empirical contributions. First, Sata's approach to economic management had features of 'macroeconomic populism'. Dornbusch and Edwards (1990: 247) described macroeconomic populism as 'a policy perspective to macroeconomic management that emphasizes economic growth and redistribution while deemphasizing the risks of inflation, deficit finance and external constraints', among others. For Sata, populism was not just a political strategy on the campaign trail, but also a strategy that guided policy implementation during his presidency. He translated his election promises into policies that rewarded his urban supporters. Even then, formal (rather than informal) economy workers were often the beneficiaries of reforms such as wage and tax regulation that were implemented to put more money in people's pockets. Sata's policies can also be defined as populist based on the criteria set out by Cheeseman, Ford and Simutanyi (2014: 339 - 341). Their description of populist policies revolved around two factors.³ On one hand, populist policies are associated with high levels of state intervention in the economy which creates intense pressure for national governments to implement subsidies and handouts. On the other hand, populist policies are associated with unsustainable spending to deliver public services and 'put money in people's pockets'. Taken together, populist policies provide short-

³ Cheeseman, Ford and Simutanyi's (2014) discussion on populist policies is informed by the work of Roberts (1995) and Weyland (1999; 2001). They also discuss populist policies (and their implications) in Zambia during the 1980s.

term benefits to citizens but have the potential to increase national debt and introduce distortions into the economy in the long-term.

Second, although populism informed Sata's approach to economic management, his agenda was not devoid of programmatic reforms. His administration also implemented programmes which benefited citizens in both PF and opposition party strongholds. Kitschelt and Wang (2014: 44 - 45) described a party as programmatic if it emphasized policies that affect large categories of citizens regardless of whether the beneficiaries of the policies voted for the party or not. Parties can also be described as programmatic when they demonstrate a strong commitment to delivering on promises made during the election campaign (Kitschelt & Wang, 2014: 44-45). Sata's government implemented significant reforms to expand the coverage of social cash transfers (SCTs), which was also an election promise. SCTs targeted the poorest citizens in all provinces of the country. This was a significant departure from the MMD government which placed little emphasis on cash transfers. Sata's government also implemented other manifesto promises. It implemented reforms to improve agriculture subsidy programmes and invested massively in infrastructure (including roads and power). Nonetheless, spending on subsidies often exceeded allocations. Further, Sata's government relied heavily on external borrowing to finance the PF's infrastructure agenda, often disregarding the concerns of the opposition and multilateral development agencies that warned against creating a debt burden.

Thirdly, Sata's approach to economic management was more popular amongst Zambians (at least in the short-term) than the approach of MMD governments in the 2000s. Afrobarometer surveys show that Zambians rated Sata's handling of the economy more positively in 2012 and 2014 than they had rated the MMD government in 2009. Both rural and urban citizens reported more positive evaluations of PF in 2012 than they did in 2009. However, their evaluations had declined by 2014 – even though they remained higher than the 2009 levels. Importantly, urban citizens and Bembas – who were the core of Sata's electoral support – reported a sharp increase in support for the performance of the president after Sata was elected. The data provide some evidence that beyond being an effective mobilization strategy, Sata's populist discourse (and the reforms that came with it) was a more popular basis for economic management than the MMD's focus on development planning and economic stability.

A broader argument made in this paper is that the policies implemented by Sata were aimed at fulfilling his election promises and making the state the primary driver of development. This was especially true in sectors that were crucial to the party's agenda such as infrastructure development. Moreover, Sata's support for interventionist policies was also an attempt to recreate the statist development model implemented by Kaunda's United National Independence Party (UNIP) government, especially during the 1960s and 1970s. This contrasted with policies

under MMD governments which were guided by national development plans (in the 2000s) and were mostly consistent with reforms advocated by international donors (Larmer & Fraser, 2007; Cheeseman, Ford & Simutanyi, 2014). Compared to his immediate predecessors, Sata was less cautious of technocratic decisions and had less regard for development planning.

Yet, there were limits to the implementation of Sata's election promises. Like the MMD government, he pursued a market friendly economy with a hitherto greater role for Chinese investment (Leslie, 2016). The influence of Chinese investment under PF was a significant departure from the party's position before 2011. His administration also maintained Banda's mining tax regime, despite his election promise to tax the mines more (Lundstøl & Isaksen, 2018: 9). Further, his government was unable to contain spending on input subsidies despite attempts to implement programmatic reforms to agriculture.

The limits to Sata's agenda can be explained in part by the implications of factionalism within PF. The PF comprised a faction of 'leftists' like Sata, his vice president Guy Scott, and party secretary general Wynter Kabimba, who largely supported a pro-poor economic agenda. Yet, it also included a pro-business faction comprising wealthy businessmen who financed Sata's campaigns when he was an opposition leader. Members of this faction, who were mostly Sata's co-ethnics, had business interests that they needed to safeguard during his presidency. They were therefore not necessarily supportive of his leftist agenda but supported policies (including expensive infrastructure development) that provided opportunities for rents.

A third faction that supported Sata's rise to power is a group famously known as the 'cartel'. This group used its influence in the private media, amongst wealthy businessmen, and amongst anti-corruption crusaders to shore up Sata's support in 2011 (Sishuwa, 2020b).⁴ Members of the 'cartel' were essentially anti-establishment and supported Sata to protect their own business interests that were threatened by Banda's administration. In power, Sata had to reward the pro-business faction and 'the cartel,' including through government contracts which

⁴ The de facto leader of the 'cartel' was Fred M'membe, the proprietor of *The Post*, Zambia's leading tabloid during the 1990s and 2000s. Another member of 'the cartel' was Rajan Mahtani, a Zambian of Asian origin, who owned Finance Bank and had influence within the wealthy Asian-Zambian community. Mahtani had supported the MMD under Mwanawasa but fell out of favour with the party when Banda was elected. Under Banda, the central bank took over the operations of Finance Bank for flouting banking regulations. A third prominent member of the group was Mutembo Nchito, a leading prosecutor during Chiluba's corruption trial in the early 2000s. M'membe and Nchito were business partners in Zambian Airways, a short-lived airline during the 2000s that benefited from state support under Mwanawasa. However, the two individuals fell out of favour with the establishment when Banda was elected, and their airline collapsed shortly after.

were often implemented at inflated costs (Scott, 2019: 151). Even though Sata had won power based on protecting the poor from ‘corrupt’ elites, business elites associated with the PF also benefited from his presidency.

The rest of this paper proceeds with a discussion of populism in power, drawing lessons from other contexts where leaders considered to be populist have assumed office. It then turns to a discussion of the PF’s path to power before considering the broader implications of the PF in government. Thereafter, it provides an analysis of three policy areas in which the Sata administration implemented reforms that are useful for understanding the implications of his mobilization strategies on public policy. These are social protection, infrastructure development, and agriculture. The penultimate section provides an analysis of Afrobarometer survey data to understand the attitudes of Zambian citizens towards Sata’s policies. The conclusion discusses the broader implications of Sata’s presidency.

2. Populism in power

Much of the literature on what populist leaders do when elected to power falls into two main categories. The first is concerned with the relationship between populism and liberal democracy (Kaltwasser & Taggart, 2016; Taggart & Kaltwasser 2016; Houle & Kenny, 2018; Pappas, 2019). This literature is informed by the belief that populism is the opposite of liberal democracy, and operates in a manner where institutions, the rule of law, and minority rights are secondary to the interests of ‘the people’ (Pappas, 2019: 70). At its worst, populism has resulted in outright dictatorship in countries such as Venezuela under Chávez and his successor Nicolás Maduro (*ibid.*: 82).

The second category – which is the focus of this paper – is concerned with the economic consequences of populism (Houle & Kenny, 2018; Kyle & Gultchin, 2018; Pappas, 2019). The economic consequences of populist leaders are generally considered to be negative. Evidence from Latin America shows that high income inequality provided incentives for populist leaders to emerge. Once in power, populist leaders faced intense political pressure to adopt macroeconomic policies that raised the incomes of low-income groups. This in turn contributed to ‘bad policy choices and poor economic performance’ in the long run (Sachs, 1989: 1). Sachs described this as a ‘populist cycle’, which was characterized by ‘expansionary macroeconomic policies which led to high inflation and severe balance of payments crises’ (*ibid.*). Populist policies have also been associated with long-term economic decline in European countries such as Greece (Pappas, 2019).

While populism is far less prevalent in Africa than it is in Latin America and Europe, there have been at least three epochs when leaders who can be described

as populists emerged on the African continent. The first wave of African populism can be traced to the independence era of the late 1950s and 1960s, when charismatic leaders such as Kwame Nkrumah in Ghana, Julius Nyerere in Tanzania and Kenneth Kaunda in Zambia came to power (Sishuwa, 2020a). These leaders were more commonly described as nationalist or charismatic rather than populist. Like most African nationalists, they were populists leading the people against a ‘foreign’ elite. They were also known to promote development agendas that revolved around personalized ideologies such as *Nkurumaism* in Ghana, Nyerere’s *Ujamaa* and Kaunda’s *Humanism* (Sishuwa, 2020a: 4). Their personalized ideologies rested on the charisma of the leaders but were also rooted in various conceptions of socialism and statist development. Kaunda’s *Humanism* for example, was built on socialist principles that included the establishment of a welfare state (through universal coverage of healthcare, education, food subsidies and price controls) and the expansion of social infrastructure including clinics, colleges, hospitals, schools, and roads (Noyoo, 2020: 132-133).

The second wave of populism occurred in the 1980s when military leaders replaced political elites of the independence era. This includes leaders like Jerry Rawlings in Ghana, Thomas Sankara in Burkina Faso, and Yoweri Museveni in Uganda, who came to power in the form of popular coups to serve the interests of ‘the people’ who had been exploited by the (indigenous) political elite (Resnick, 2017; Sibiri, 2021). These leaders had the distinction of being charismatic and tended to favour economic strategies that focused on ‘heavy state intervention, import substitution industrialization, rural collectivization schemes, and distribution through social welfare spending, subsidized commodities and land reforms in rural areas’ (Resnick, 2017: 114). Zambia’s Frederick Chiluba could also be considered as part of the second wave of populist leaders. Although Chiluba came to power in the early 1990s through multiparty democratic elections, he replaced an independence era leader. Moreover, much like Chiluba, Rawlings and Museveni also implemented neoliberal economic reforms in the 1990s (Resnick, 2017: 113).

The most recent wave of African populism emerged in the early 2000s and can be attributed to two main factors. The first is the negative consequences of the International Monetary Fund (IMF) and World Bank supported structural adjustment programmes (or neoliberal economic policies) in the 1990s. The second is the ‘urbanization of poverty’ – which describes a situation where African cities have become major sites of poverty, inequality, and unemployment, despite strong economic growth (Resnick, 2017: 119). Sata, Wade and Zuma are among the most prominent African leaders described as populist to be elected president in the 2000s. However, these leaders were not only dependent on urban support. They broadened their electoral coalitions by combining populist electoral strategies targeted at urban voters with ethnic or religious (in the case of Wade)

appeals that resonated with rural voters (Resnick, 2014). The most recently elected African leader to be described as populist is Tanzania's John Magufuli who was president from 2015 until his death in March 2021. However, there is some debate that Magufuli's discourse was elitist plebeian⁵ rather than populist (Paget, 2020b).

The evidence on third wave populists has focused more on their characteristics and election strategies but less so on their economic performance (Resnick, 2014; 2017). A notable exception is Henning Melber's (2018) discussion of populist rule in Southern Africa (including South Africa). He shows that Zuma (like other liberation movement leaders turned populists in Southern Africa) used his presidency to legitimate the ruling African National Congress' (ANC) continued struggle against 'white monopoly capital' by presenting himself and the ANC as defenders of the predominantly black and poor working class. Yet, Zuma presided over 'large scale corruption, embezzlement, nepotism, and state capture – the systematic looting of state assets and coffers' (Melber, 2018: 683). The effect of Zuma's populism was poor service delivery and the impoverishment of ordinary citizens, who unlike the middle class or rich, could not afford economic goods and services (Desai, 2018: 505). While Magufuli's classification as a populist is contested, he was regarded as a 'bulldozer' who fought corruption in Tanzania's bureaucracy, and implemented an industrial development agenda that aimed to recreate Nyerere's nationalist development agenda – which emphasized strong state intervention and infrastructure (Paget, 2020a).

3. The PF's path to power

Michael Sata had a long political history in Zambia, starting as a trade unionist and UNIP branch leader in the 1960s. He was Governor of Lusaka and Member of Parliament (MP) for Kabwata (in Lusaka) in the 1980s, before defecting to the MMD in January 1991 (Sishuwa, 2016: 135). During the MMD's first term, following its election in October 1991, he served again as MP for Kabwata and was appointed to Chiluba's cabinet, first as Minister of Local Government and Housing, before being transferred to Health. In 1996, he was elected MMD MP for Mpika in Northern Province and was appointed Minister Without Portfolio which he combined with the powerful position of MMD National Secretary until 2001 (Sishuwa, 2016). Sata left the MMD in 2001 after his attempt to succeed Chiluba (who was term limited) was frustrated by the selection of his old nemesis, Levy Mwanawasa. He then formed PF a few months before general elections held in December 2001. In the 2001 elections, which Mwanawasa won, Sata placed

⁵ Paget argues that while populism bifurcates society between 'the people' and 'the elite', elite plebeianism trifurcates society between 'the people' and two groups of elites – one that is antagonistic to 'the people' and another that is a friend and advocate of 'the people'. Magufuli associated himself with the latter.

seventh in a race contested by 11 presidential candidates obtaining only 3% of the vote while his party earned one parliamentary seat in his ethnic Northern Province (Scott, 2019).

Despite his longevity in Zambian politics, Sata successfully reinvented himself as a political outsider who took on the establishment on behalf of the people. In response to his dismal 2001 performance, he began to transform PF from a party with support limited to ethnic Bemba voters to one that articulated ‘the frustrations of the working class and urban poor’ (Cheeseman & Hinfelaar, 2010: 64). In the economically strategic Copperbelt province, Sata built support around the important networks of employed and retired mineworkers who were affiliated to the Mine Workers Union of Zambia (Larmer & Fraser, 2007). By the mid-2000s, Sata shifted from relying on trade union support to populist strategies in response to the economic challenges that persisted under the MMD government. During Mwanawasa’s first term, the MMD presided over a growing economy supported by rising copper prices (Cheeseman, Ford & Simutanyi, 2014: 345). Nonetheless, there was little progress in the improvement of living conditions for most of the urban poor, and foreign investors were perceived to be the major beneficiaries of high copper prices (Resnick, 2014). This fueled urban resentment towards MMD policies. Sata addressed these issues in his efforts to appeal to urban voters while also relying on ethnic appeals to win the support of his rural co-ethnics (Cheeseman & Larmer, 2015).

In the 2006 general elections, the PF increased its share of votes. Sata improved remarkably from a seventh finish in 2001 to runner up in 2006, obtaining 29% in the presidential vote. Meanwhile, PF won 42 out of 150 parliamentary seats. The untimely death of Mwanawasa in August 2008 necessitated a presidential by-election, held in October. The election was closely contested by Banda⁶ of the MMD, Sata of the PF, Hakainde Hichilema of the United Party for National Development (UPND) and Godfrey Miyanda of the Heritage Party. Like his 2006 campaign, Sata focused on issues that resonated with the urban underclass. He favoured more state intervention in the economy and less foreign influence which led Cheeseman, Ford and Simutanyi (2014: 344) to argue that ‘as with all populists, his worldview was an explicitly interventionist one: the government can make things better for ordinary Zambians, and it can do so quickly.’ After obtaining 40% of the vote, Banda won a narrow victory, receiving roughly 33,000 more votes than his closest rival, Sata, who obtained 38%.⁷

⁶ Banda had served as Mwanawasa’s Vice President between September 2006 and June 2008 and as Acting President from June 2008 to October 2008, the period from Mwanawasa’s incapacitation after suffering a stroke until presidential by-elections held after Mwanawasa’s death.

⁷ Data from Electoral Commission of Zambia, <http://www.elections.or.zm/> [2015, May 15].

Sata maintained his use of populist strategies in the campaign for the 2011 election. The party's official campaign slogan was 'vote PF for lower taxes, more jobs and more money in your pockets'. The party also developed the slogan *Donchi Kubeba* ('don't tell' in Bemba) which 'proved to be an effective way of dealing with political competitors (particularly the MMD) who could afford to comprehensively outspend the opposition' (Sishuwa, 2011). The implication of the slogan was that voters should accept the campaign bribes from the MMD but refuse to tell who they planned to vote for (Scott, 2019: 16). Further, Sata made a range of campaign pledges that he promised to enact within 90 days of PF forming government. These promises ranged from enacting a new constitution, to constructing new roads in Western Province, and restoring the Barotseland Agreement⁸ (Sishuwa, 2016).

The PF also differentiated itself from the MMD on policy positions and adopted a far more interventionist platform than its main competitors that generally supported liberal (or neoliberal) economic policies. For example, the MMD's manifesto stated that the party would provide 'a liberal economic environment to create renewed local and foreign investor confidence' (Movement for Multiparty Democracy [MMD], 2011: 4). The PF manifesto criticized the MMD's economic approach, including its focus on growth. The manifesto stated the following:

The MMD government has been boasting of economic growth but this is due purely to a copper boom on the international market which is driving up our "paper" GDP. None of this economic growth is reaching the people in the villages and townships – it is not pro-poor growth such as PF will aim to create. Access to quality education and health care for the majority of our people has remained only a pipedream while the elite continue to promote their predatory social and economic habits at the expense of the majority (Patriotic Front [PF], 2011: 4).

The PF manifesto also criticized development planning under the MMD. The PF argued that:

Unlike the MMD, the principal objective and thrust of PF economic policy is on pro-poor growth. MMD's management of the economy in recent years, while it has benefited some types of foreign investor and some classes of privileged Zambian, has left the majority of citizens in a state of helplessness and poverty...Even positive achievements at the

⁸ According to Resnick (2014: 220) 'the Barotseland Agreement was signed in 1964 by the king of Barotseland, the British colonial secretary and Kenneth Kaunda in order to bestow the king and the Barotse Royal Establishment with particular rights and privileges that were not awarded to other traditional leaderships. In exchange, the king was to cease overtures for secession and the formation of an independent Barotseland. Yet in 1969, Kaunda abrogated the Agreement.'

macroeconomic level – such as a relatively strong exchange rate or a national maize surplus – mean nothing to the majority of people who lack the income to buy a balanced diet for their family, or to purchase one of the second hand imported vehicles that have become so conspicuous on our roads (PF, 2011: 33-34).

Sata's populist discourse eventually paid off after ten years in opposition. He won the 2011 elections with 42% of the vote against Banda's 36%. The section that follows considers the PF's broader approach to economic management during Sata's three-year presidency, from 2011 to 2014, before discussing policy reforms in social protection, infrastructure, and agriculture.

4. The PF in power

Sata formed government in September 2011 and appointed several of his longtime political associates to cabinet, including Guy Scott (Vice President) and Emmanuel Chenda (initially Minister of Local Government). A year later, he appointed another of his close associates, Wynter Kabimba, as Justice Minister. He also appointed close family members to influential positions including his uncle, Alexander Chikwanda (Finance Minister), his wife's brother-in-law, Fredson Yamba (Secretary to the Treasury) and his nephew, Miles Sampa (Deputy Finance Minister). Other appointments included members of the cartel and their associates, including Mutembo Nchito (Director of Public Prosecutions), Mumba Malila (Attorney General, who served in the same position from 2006 to 2009 under Mwanawasa), Musa Mwenye (Solicitor General), Michael Gondwe (Bank of Zambia Governor), and Patrick Matibini (who was elected Speaker of the National Assembly with the backing of PF MPs). Sata's appointments encompassed all the major factions that had supported his presidential campaign.

Sata adopted an interventionist approach early into his presidency. In October 2011, he reversed the sale of Finance Bank and returned it to its previous owners (including Mahtani). In December 2010, the Bank of Zambia had dispossessed Finance Bank from its owners – and sold it to First Rand Bank of South Africa – for breaching the Financial Regulations Act (Cheelo & Hinfelaar, 2020: 21-22). In January 2012, the PF government reversed a 75% sale of ZAMTEL, the country's largest telecoms company, claiming the transaction was fraudulent. ZAMTEL, which was wholly owned by the Zambian state prior to its partial privatization, was sold to a Libyan investor in 2010 by Banda's administration.⁹ In January 2014, the PF established the Industrial Development Corporation (IDC), which was chaired by the president, as an institution to operationalize its national industrial policy (Hinfelaar & Sichone, 2019: 17). The IDC – which

⁹ BBC News, 'Zambia: President Sata reverses Libyan Zamtel sale,' 24 January 2012. Retrieved from <https://www.bbc.com/news/world-africa-16709079> [2021, January 25].

shared the same name as a Kaunda era parastatal – was established to serve as an active investor and shareholder in state-owned enterprises (*ibid.*). The PF government also absorbed the Road Development Agency [RDA] (which was also chaired by the president) and the Public Private Partnership unit into State House (*ibid.*: 18). These reforms all demonstrated Sata’s commitment to be more interventionist than his predecessors.

While promoting reforms aimed at making the state more interventionist, Sata reneged on his pre-electoral promise to limit the role of Chinese investors. Within days of being elected president, Sata met with the Chinese Ambassador to Zambia and a month later, he hosted a luncheon for the Ambassador and a delegation of 150 Chinese businessmen based in Zambia at State House (Leslie, 2016). The Ambassador promised development assistance to Zambia including through ‘loans and investments to repair railway lines, build roads, bridges, schools, hydropower stations, and power transmission lines’ (Leslie, 2016: 99).

Possibly to avoid the potential backlash from his supporters for embracing the Chinese, Sata quickly implemented reforms to put more money in people’s pockets early in his presidency. However, formal economy workers were the main beneficiaries of these reforms which did not directly benefit the rural poor and urban informal economy workers. In the 2012 national budget address, Chikwanda announced measures aimed at reducing taxes, in line with the PF manifesto. Chikwanda (2011) stated the following:

Mr. Speaker, during the run up to the [2011] election, the PF Government made a commitment to the people of Zambia that it will streamline the tax system, lower tax rates and promote tax compliance. One of the commitments we made was to put more money in people’s pockets...as a first step to honour our commitments, I propose to double the threshold for PAYE [pay as you earn] from K12 million to K24 million per annum. This will...result in more than 80,000 low paid workers [including domestic workers and shop assistants] moving out of the taxable brackets.

To further address issues related to formal economy workers, Sata issued (in October 2011) instructions to his justice minister to revise the retirement age from 55 to 65. The PF government planned to save money by potentially paying out less to retirees – ‘if they were in retirement for less time’.¹⁰ This was also an

¹⁰ See: Lusaka Times, 4 October 2011, ‘Up retirement age to 65 – Sata’ <https://www.lusakatimes.com/2011/10/04/retirement-age-65-sata/> [2021, January 24] and: DW, 18 January 2012, ‘Opposition over plans to raise retirement age in Zambia’ <https://www.dw.com/en/opposition-over-plans-to-raise-retirement-age-in-zambia/a-15672279> [2021, January 24].

attempt at pension reforms, aimed at addressing the perennial problem of delayed payments of pensions to retired workers by the state's pension funds.

Furthermore, in March 2013, the government announced that salaries for civil servants would be increased effective September that year. The government increased salaries for civil servants, with some getting pay increases of up to 200% (Leslie, 2016: 99). The Minister of Labour and Social Security at the time, Fackson Shamenda, proclaimed that these measures were a fulfillment of the PF's manifesto promise to 'put more money in people's pockets' (*ibid.*). Other benefits included the introduction of a health personnel shift allowance at 15% of basic salaries for medical personnel and a night duty allowance at 7% of basic salaries (Lusaka Times, 27 March 2013). The Permanent Secretary of the Public Service Management Division noted that these reforms were 'a clear demonstration of Government's desire to improve the welfare of its employees' (*ibid.*). Government reports show that 2,980 civil servants had their salaries adjusted upwards by October 2014 (Ministry of Finance, 2015). Furthermore, the government recruited 3,100 employees to the public service between 2013 and 2014, which resulted in an increase of the public service wage bill from K824 million in September 2014 to over K1 billion in October 2014 (Ministry of Finance, 2015). These policy adjustments were consistent with the PF's promises to create jobs and increase disposable incomes.

There were unintended negative consequences of some of Sata's wage and tax reforms. Reforms to increase minimum wages for example, were directly associated with an increased cost of living. Businesses (including shop and transport owners) passed on the costs of implementing the minimum wage to their consumers by increasing prices and fares.¹¹

The wage regulation reforms did not address informal economy workers such as street vendors and market traders. Under the MMD, street vendors were routinely harassed, while informal trading stores and shanty compounds were demolished under the MMD's 'Keep Lusaka Clean' campaign (Resnick, 2017). Further, street vending was banned in Lusaka under the 2007 Street Vending and Nuisances Act which was implemented after a cholera outbreak (Resnick, 2018).

Sata had promised not to remove vendors from the streets if elected, because they lacked alternative employment opportunities. Within weeks of becoming president, he directed town clerks and council secretaries not to remove vendors from the streets and his party secretary general proposed legalizing street vending (Resnick, 2018). Sata further demonstrated his support for vendors by demoting his Minister of Local Government in 2012 when she planned to sign a new

¹¹ <https://reliefweb.int/report/zambia/minimum-wage-leads-steep-food-price-rises> [2021, January 24].

statutory instrument against vending (*ibid.*). Vending proliferated in the capital city under Sata. Patriotic Front cadres created a market (known as *Donchi Kubeba*), on a flyover bridge in Lusaka's central business district (Hinfelaar, Resnick & Sishuwa, 2020: 15).

Regarding economic management, the PF inherited the Sixth National Development Plan (whose theme was *Sustained Economic Growth and Poverty Reduction*) from the MMD and immediately started a process of revising the plan to incorporate PF policies. This resulted in the publication, in 2014, of the Revised-Sixth National Development Plan (R-SNDP) 2013 – 2016, which 'took on board the priorities of the PF government' and was anchored on the theme '*People Centred Economic Growth and Development*' (Government of the Republic of Zambia [GRZ], 2014: ii). To a large extent, the SNDP and R-SNDP had the same objectives, including accelerating infrastructure development and enhancing human development. In practice, the PF invested more in infrastructure (including roads, railways, and power) than the MMD did. Table 1 shows selected government expenditure for the period 2011 to 2014. This includes the amount released for each item and the variance (difference between the budget allocation and released amount) in percentage terms.

The data show that the PF's spending priorities, in the period 2012 to 2014, were like those of the MMD in 2011.¹² However, the PF notably poured funds into power and railway infrastructure, while increasing its spending on roads, especially in 2013 and 2014. Reforms to increase salaries for civil servants and to create more public sector jobs also meant that the cost of personal emoluments increased each year.

¹² The 2011 budget was prepared by the MMD government in 2010. It was also largely executed by the MMD government which remained in power until September 2011.

Table 1: Selected Government Expenditure 2011- 2014

	2011		2012		2013		2014	
Expenses	Releases (ZMW millions)	Variance	Releases (ZMW millions)	Variance	Releases (ZMW millions)	Variance	Releases (ZMW millions)	Variance
Personal emoluments	7,312	-0.2%	9,390	9%	11,897	8%	15,750	2%
Interest payments	1,082	-13%	1,903	1%	1,873	-7%	3,711	22%
Farmer Input Support Programme	895	85%	840	68%	1,122	125%	1,455	191%
Food Security Pack	15	0%	25	0%	28	12%	8	-84%
Pension fund	765	113%	800	69%	616	0%	599	-21%
Roads	2,176	43%	1,362	-39%	3,611	43%	3,036	5%
Power rehabilitation	-	-	940	9%	369	-63%	550	0%
Railway rehabilitation	-	-	-	-	618	-4%	142	-58%
Social Cash Transfer	-	-	-	-	-	-	100	-50%
By elections	11	168%	14	126%	64	1,500%	160	3,899%
Other	10,129	60%	10,546	-0.8%	13,592	2%	13,030	-2%
Total	22,385	11%	25,820	-2%	33,790	6%	38, 541	-6%

Source: Ministry of Finance Annual Economic Reports, 2011 – 2014.

Although Sata had criticized the MMD's spending on farm input subsidies and maintained nominal budget allocations at around K500 million from 2012 to 2014, his government overspent on subsidies by 125% in 2013 and 191% in 2014. The government also overspent on by-elections, by 1,500% in 2013 and almost 4,000% in 2014. Between 2011 and 2015, the PF increased its number of MPs from 61 to 87, through parliamentary by-elections. These elections were caused mostly by the nullification of opposition seats that were petitioned by the PF due to alleged corruption in the 2011 elections. The by-elections were also caused by induced defections of MMD and UPND MPs to the PF. Defecting MPs who retained their seats for the PF were later offered ministerial positions in Sata's government. Sata essentially used by-elections to manufacture a majority in parliament.

Given the Zambian economy's reliance on copper mining, the extent to which taxes collected from mining contributed to government revenues was crucial for economic management. Although the PF debated imposing higher taxes on mining firms, it resisted calls to impose a 25% windfall tax on base metals. This was largely due to Sata's inability to overcome vested interests in the mining sector. Consequently, Sata implemented a mining tax regime like the one Banda had implemented (Lundstøl & Isaksen, 2018: 9). At the time of the PF's election in 2011, taxes collected from copper mining accounted for 35% of total taxes (Sikamo, Mwanza & Mweemba, 2016: 495). This was a significant increase from the period 1995 to 2000, when mines paid between 1 and 2 percent of all taxes (*ibid.*). The 'favourable' revenues generated from the mining sector provided the PF government with an incentive to invest in the expansion of energy and road infrastructure, and to expand the provision of social services. Nevertheless, the PF's investment plans exceeded actual revenues. Consequently, the government decided to finance its plans through debt, confident that the energy and transport infrastructure projects would generate sufficient revenues to repay the debt but also because the long-term economic growth and copper price projections at the time were deemed favourable to the government.¹³ The government raised a 10 year \$750 million Eurobond in September 2012 and a \$1 billion 10-year Eurobond in April 2014 (Kalikeka, Nalishebo & Banda-Muleya, 2019).

The government, through then finance minister, Chikwanda, also increased the debt ceiling from K20 billion in 2012 to K35 billion in 2013. This was meant to

¹³ This point was made in an interview with the head of a European bilateral agency in Lusaka in February 2015. The donor official noted that in meetings with government officials, donors warned the government to revise its expenditure downwards following a drop in copper prices and downward revision of Gross Domestic Product (GDP) growth in 2012. Nonetheless, the government justified its borrowing because of the confidence it had in the economic benefits of its projects but also because of a belief that copper prices were still favourable to provide revenue to repay future debts.

increase the borrowing capacity and to finance road infrastructure and projects aimed at railway system rehabilitation and power generation. The increase in the debt ceiling was also meant to allow more borrowing to meet revenue shortfalls in the 2014 national budget.¹⁴ Chikwanda's motion to raise the debt ceiling was strongly opposed by opposition parliamentarians from the MMD (including many who served in government administrations in the 2000s), the UPND and Independents. Opposition MPs rejected the motion, arguing that Zambians could not afford to be 'taken back to debt' nor could Zambia afford to become 'a highly indebted poor country again' after the experience with debt from the 1970s to the 2000s.¹⁵ Opposition UPND MP, Request Muntanga, argued in his debate that: 'the Government is talking about the Link Zambia 8,000 kilometer, Pave Zambia 2,000 kilometer road projects and commissioning other infrastructure projects when they are outside the Budget. Please, for heaven's sake, let us slow down!'¹⁶ The PF government had sufficient support in Parliament (including from co-opted opposition MPs) to pass the motion despite arguments from the opposition.

In 2014, the PF passed another vote in Parliament to increase the domestic borrowing threshold from K200 million to K13 billion, arguing that 'the intensity of Government's developmental agenda made it necessary to increase borrowing' (Lusaka Times, 26 February 2014). This motion was also opposed by opposition MPs who again argued that the decision was irresponsible given Zambia's background with debt. United Party for National Development MP, Jack Mwiimbu, argued that 'a number of countries that are in the habit of borrowing are now on their knees, and that is where we are heading to' (*ibid.*).

Under Sata, the PF clearly focused on putting more money in people's pockets through wage and tax regulation for formal economy workers and cash transfers (discussed later) and agriculture subsidies for the rural poor. It also emphasized borrowing to invest in infrastructure and promote growth, while deemphasizing the potential risks of high inflation and accumulating unsustainable debt. Moreover, Sata spent excessively on by-elections to generate a parliamentary majority. This spending was certainly not productive.

Sata's agenda also coincided with a decline in GDP growth and increased national debt. GDP growth declined each year, from a high of 10.3% in 2010 under the MMD, to 7.6% in 2012, 5.1% in 2013 and 4.7% in 2014. The downward trajectory continued under his successor reaching a low of 1.7% in 2019.¹⁷ At the same time,

¹⁴ Motion to Parliament by the Hon. Minister of Finance, Alexander Chikwanda, to increase amount outstanding at any one time on external loans, 27 November 2013. Available at: <http://www.parliament.gov.zm/node/593> [2015, May 15].

¹⁵ *Ibid.*

¹⁶ *Ibid.*

¹⁷ Data on GDP growth rates for Zambia are available at <https://data.worldbank.org/> [2021, January 25].

official statistics show that public sector debt also grew from \$1 billion in 2009 under the MMD to \$6.5 billion in 2015. The debt grew further to \$11 billion by the end of 2019 (World Bank, 2020: 150).¹⁸ The focus on expansionary economic policies, redistribution, unproductive spending, and the negative trends in economic growth and debt, were consistent with the description of macroeconomic populism by Sachs (1989) and Dornbusch and Edwards (1990).

5. Public policy reform under Sata

This paper considers three areas of public policy that were crucial to Sata's reform agenda. The PF had made promises to improve social protection mechanisms by expanding programmes such as SCTs and the Food Security Pack that generally benefitted the rural poor. The party had also emphasized infrastructure development as a crucial sector for promoting what it described as 'pro poor development'. Furthermore, the PF promised to address distortions in agriculture subsidy programmes. The analysis that follows shows that although the PF set out to implement programmatic reforms, it underspent on cash transfers, borrowed heavily to finance infrastructure development, and reversed course regarding farm input subsidies.

5.1 Social protection

The PF was elected based on its urban and ethnic Bemba support. Although the party promised to put more money in the pockets of citizens, the wage and tax regulations implemented during Sata's first year targeted mostly formal (and urban) economy workers. The PF administration, therefore, had an incentive to implement mechanisms that would put more money in the pockets of rural citizens as well. Cash transfers had been promoted by donors since the early 2000s but had little support under the MMD government. While not a prominent feature of Sata's 2011 campaign, the PF promised to expand SCTs in its manifesto.

In his first presidential address to the National Assembly in October 2011, Sata stated that chronic poverty experienced by vulnerable groups such as women, children and people with disabilities was an obstacle to developing a sound social and economic future for all.¹⁹ In his address, Sata promised that:

The government shall adopt a vibrant social protection policy aimed at ensuring that all citizens have access to basic social services such as

¹⁸ According to a Zambian economist with knowledge of the country's debt, the official debt figures exclude several undisclosed loans. This means that Zambia's debt is much larger than reported.

¹⁹ Speech by His Excellency Mr Michael Chilufya Sata, President of the Republic of Zambia on the occasion of the official opening of the first session of the eleventh National Assembly, 14 October 2011.

education, health, water and sanitation. The policy shall also address the needs of the vulnerable groups that face special challenges such as the disabled and street children. In line with this, specific measures will be taken to strengthen the existing social safety-net and protection programmes. One such programme is the social cash transfer (SCT) scheme which unfortunately is currently fully funded by donors thereby making it unsustainable and restrictive. My government will in collaboration with cooperating partners work out measures to improve the scheme and make it more sustainable by gradually supporting it from our domestic resources in the national budget.²⁰

After two years in office, Sata seized on the opportunity to promote cash transfers and redistribute wealth to rural citizens. The promise to strengthen the existing social safety-net and social protection programmes was followed by a government commitment to increase budgetary allocations to social programmes. In October 2013, Chikwanda presented the 2014 national budget to parliament and announced measures to increase the government's contribution to the SCT scheme by over 700%.²¹ This was aimed at providing a more effective means of targeting the most vulnerable, as opposed to subsidy programmes that had been favoured by the MMD that did not benefit the 'intended poor'.²² The PF government also increased funding for the Food Security Pack, a smaller input subsidy programme targeted at small scale farmers described as 'poor but viable'.

The decision to increase the budgetary allocation to SCTs led to a significant expansion in the number of household beneficiaries. Prior to 2014, the number of beneficiary households had increased from 1,200 in 2003 (in a single district) to 24,500 (in five districts) by the end of 2010 (Siachiwena, 2020). The SNDP included plans for the MMD government to increase the number of beneficiaries in phases from 26,500 households in 2011 to 69,000 households countrywide by 2015 (GRZ, 2011). When the PF government published the R-SNDP, the document did not provide an annual breakdown for the number of households to be added to the SCT scheme, but it included a target for 'over 500,000 households to receive transfers by 2016' (Ministry of Finance, 2014: 129). This was against a total of nearly 2.5 million households in the country at the time (Central Statistical Office, 2012: 23). This suggests that the PF expansion plans would benefit at least 20% of households nationwide. Under Sata, the number of

²⁰ Speech by His Excellency Mr Michael Chilufya Sata, President of the Republic of Zambia on the occasion of the official opening of the first session of the eleventh National Assembly, 14 October 2011.

²¹ 2014 Budget Address by Hon. Alexander B. Chikwanda, MP Minister of Finance, delivered to the National Assembly of Zambia on Friday 11 October 2013.

²² *Ibid.*

beneficiary households increased from 61,000 in 2013 to 145,000 in 2014 and 190,000 in 2015.

These figures show that there was an eightfold increase in the number of SCT beneficiary households from the time Sata assumed power and the end of 2015.²³ For PF, expanding cash transfers was part of a broader development interventionist strategy, akin to UNIP's statism and in contrast to the MMD's market friendly policies that placed little emphasis on redistribution (apart from an emphasis on farm input subsidies that were increasingly politically targeted). It also served as an attempt to redirect resources from unproductive agriculture subsidies – which did not target the poorest farmers – to labour incapacitated households that were considered the most deserving of social assistance from the state. However, the expansion of cash transfers was not devoid of political motivations. The PF needed to broaden its support to rural areas outside its traditional rural strongholds (where ethnic ties were important) by implementing programmatic reforms that contrasted with the MMD's clientelist input subsidy programmes (Siachiwena, 2020).

Nonetheless, Sata's programmatic reforms to expand the provision of SCTs belied the fact that the programme was underfunded. While data on SCT expenditure are unavailable for 2011 to 2013, Table 1 shows that the government spent only half of the allocated budget in 2014. Challenges associated with the disbursement of SCT funds continued under Sata's successor, Edgar Lungu. In the years after Sata died, funding for SCTs became erratic to the extent that beneficiary households at times went for a year without receiving benefits. The government's emphasis on infrastructure development and the associated interest repayments reportedly contributed to revenue shortfalls and constrained funding for programmes that appeared to have limited priorities amongst government leaders (such as cash transfers).²⁴ This shows that while the PF's expansion of SCTs was programmatic, its broader approach of macroeconomic populism undermined the long-term sustainability of SCTs.

5.2 Infrastructure development

Infrastructure development was a major feature of public policy during Sata's presidency. Sata had an abiding belief that physical infrastructure was the best means to 'bring development' (Scott, 2019: 150). This was largely informed by attitudes of UNIP leaders (including Kaunda) when there was plenty of money for capital expenditure (in the 1960s and 1970s) and physical infrastructure was

²³ Although Sata died in 2014, SCT expansion plans for 2015 were set by his administration in the 2014 national budget.

²⁴ This information is based on interviews conducted for this study with donor officials working in the area of social protection in Zambia and government technocrats in the Ministry of Community Development and Social Services.

considered the main constraint to development (Scott, 2019: 150). Curiously, Sata seemed to ignore the reality that Kaunda's statist vision first faltered (when copper prices plummeted in the 1970s) and then slid the country into economic decline (Noyoo, 2020: 133). Kaunda's policies had benefited Zambians in the short term but, by the 1980s, there was widespread resentment (especially in urban areas) towards UNIP's policies (Cheeseman, Ford & Simutanyi, 2014).

In some respects, Sata's focus on infrastructure development was a continuation of reforms started during the Banda administration. In December 2008 – less than two months after Banda's election – the Executive Vice President of the International Finance Corporation (IFC) met Banda and his finance minister, Situmbeko Musokotwane, and indicated that the IFC's highest priorities for expanding its development impact in Zambia included enhancing access to finance for small businesses, improving the business environment, developing infrastructure, and investing in agribusiness and tourism (International Finance Corporation [IFC], 2008). By 2010, Banda's administration had begun to invest significantly in expanding infrastructure. In August 2010, the administration obtained a \$300 million loan from the African Development Bank (ADB) for road infrastructure development. Furthermore, months before the 2011 general elections, Banda launched the Urban Road Construction Project aimed at rehabilitating inner city roads (Ministry of Finance, 2013). The then opposition PF argued that Banda was using the project to win votes while also enriching himself and his family through kickbacks on road contracts.²⁵ It was necessary for Banda to make these investments to bolster his electoral chances which were threatened by the economic decline caused by the 2008 global economic crisis and internal divisions that emerged within the ruling MMD coalition after the death of Mwanawasa.

Nonetheless, Sata's government also prioritized infrastructure development after assuming power, effectively continuing with a Banda era programme. However, an important distinction can be made between Banda and Sata's approaches. Banda's infrastructure agenda appeared to be more narrowly focused on the 2011 elections and had not been a major programme until 2010. By contrast, infrastructure development was a major focus for the PF even before forming government. This was reflected in its campaign messages and the 2011 party manifesto. For the PF, infrastructure was not just an electoral strategy, but an attempt to recreate a statist development programme that existed in the immediate post-independence era. The statist agenda during Kaunda's era included massive state investment in developing national infrastructure. Yet with the introduction

²⁵ See for example: 'RDA [Road Development Agency] happy with Sata's takeover' in The Post newspaper, 26 September 2012.

of structural adjustment in the 1990s, state investment in infrastructure declined significantly leaving much of the country's infrastructure in decay.

Moreover, for PF, infrastructure development also provided an opportunity to create labour intensive jobs. This was consistent with the PF's promise to create more jobs and to increase disposable incomes for the poor. The labour-intensive jobs that the party planned to create were for the benefit of unskilled labourers who constituted a large segment of the party's support base. The infrastructure agenda was not limited to roads but was also meant to extend to rail, telecommunications, energy, education and health services, water supply and sanitation facilities, public buildings, and housing (PF, 2011: 28). For the PF, infrastructure development was necessary to support the delivery of public services, to increase economic opportunities and achieve 'meaningful' national development (*ibid.*).

In line with the party's focus to invest in infrastructure, Sata's government launched the Link 8000 project in September 2012. This was a massive infrastructure project aimed at constructing 8000 kilometers of road countrywide within five years. This was aimed at addressing the country's decrepit road infrastructure, which was a concern for voters, while also promoting employment creation. In his presidential speech on the official opening of the National Assembly in 2013, Sata noted that the government would also implement the 'Pave Zambia 2000 Project' to pave public roads and public places across the country. The project was expected to create over 20,000 jobs for the youth (Lusaka Times, 16 January 2013). The PF government also massively expanded spending on railway and energy infrastructure. Further, between 2011 and 2014, Sata created a new province (Muchinga, which included his home district, Mpika) and 31 new districts countrywide.²⁶ The government planned to construct schools, clinics, roads, police stations and other infrastructure in each new district.

Infrastructure development was mostly financed by external and domestic borrowing. In his presentation of the 2012 budget, Chikwanda announced that the government had contracted external loans of US\$500 million to finance infrastructure projects for roads, energy, and agriculture (Chikwanda, 2011). The ten-year \$750 million Eurobond that was issued in September 2012 was also meant to finance energy and transport infrastructure projects (Chikwanda, 2012). While borrowing for infrastructure was intended to achieve sustainable pro-poor development, there were at least two implications of increased borrowing. Firstly, according to official government statistics, government borrowing as a percentage of Gross Domestic Product (GDP) increased from 5.6% in 2012 to 18.4% in 2013 before reducing to 13% in 2014. Secondly, between 2012 and 2015, the Zambian

²⁶ Muchinga Province combined eight districts that hitherto formed part of Northern Province and four that were part of Eastern Province.

government faced recurring fiscal deficits which were attributed to debt repayments because of increased government borrowing for infrastructure projects and declining government revenues due to a decline in copper prices (Chelwa, 2015).

While in opposition, the PF had decried the MMD's inability to invest in infrastructure. The party manifesto noted that many parts of Zambia resembled 'ghost towns despite five years of record mineral prices and a production boom' because the MMD was obsessed with 'maintaining tight money through fiscal and monetary policies' (PF, 2011: 28). Sata's emphasis on infrastructure development was clearly meant to resolve what he considered to be one of the country's biggest challenges regardless of the cost or implications for economic stability. According to Scott (2019: 151), Sata was aware that infrastructure development was proving too costly for the government but was desperate to address the 'decades of decay' with 'speed and force'. Sata was also unable to contain the inflated costs of infrastructure development because some of the contracts associated with the projects benefited powerful PF factions that expected to be rewarded by his presidency (Siachiwena, 2020). This suggests that Sata's desire to implement his vision of development – which was reminiscent of Kaunda's approach in the 1960s and 1970s – provided an incentive for him to pursue reforms that had the potential to undermine macroeconomic stability in the long-term. This was consistent with the 'populist threat' that Cheeseman, Ford and Simutanyi (2014) warned of early in Sata's presidency. They had warned that Sata would likely adopt 'short-termist' policies to fulfil his campaign promises and reward his supporters. Yet, such policies would also 'distort the economy and undermine prospects for long-term economic growth' (*ibid.*: 361). Nonetheless, Zambian citizens rated the PF government's handling of infrastructure development positively, as shown later in this paper.

5.3 Agriculture

During the 1990s, there was widespread agreement – especially amongst international development agencies – that the costs of implementing agriculture input subsidy programmes in Africa generally outweighed their benefits (Jayne et al., 2018: 3). Because of this, many African governments – and those that implemented Structural Adjustment Programmes (SAPs) – abandoned large scale subsidy programmes. From around 2000, several African countries reintroduced agriculture input subsidy programmes, against the advice of multilateral organizations. The relaxation of the constraints associated with SAPs and the Highly Indebted Poor Countries (HIPC) initiative meant that African governments had incentives to revive subsidy programmes that were necessary for ensuring food security. Subsidies were also politically popular with the rural poor and provided an opportunity for political leaders to reward rural voters in the multi-party democratic era (Jayne et al., 2018: 3).

Zambia was among the countries to reintroduce input subsidy programmes. The Fertilizer Support Programme was introduced in 2002 and was replaced by the Farmer Input Support Programme (FISP) in 2009 as the country's main input subsidy programme (Mason et al., 2020: 2). The Farmer Input Support Programme was the largest redistributive programme implemented by the state, targeting 900,000 farmers in the 2010/11 farming season (Mason, Jayne & van de Walle, 2013: 22). It was implemented at a huge cost to the government, accounting for an average of 30% of total government spending on agriculture between 2004 and 2011 (Mason, Jayne & Mofya-Mukuka, 2013: 5). Despite the extensive reach of the programme, survey data found 'considerable evidence of politically motivated targeting of farm inputs' by the MMD, with 'areas won by the ruling party in the last presidential election receiving significantly more subsidized fertilizer than those in areas the party lost' (Jayne et al., 2018: 7). The MMD was able to obtain loyalty from rural voters through FISP, which compensated for the decline in its urban support (Hinfelaar & Sichone, 2019: 15). The programme was also fraught with several important challenges such as rapid escalation of costs, late delivery of inputs to farmers and huge discrepancies between the number of inputs released by government and what was successfully delivered to farmers (World Bank, 2010).

The challenges associated with FISP provided an incentive for the PF to propose reforms to the agriculture sector. In May 2013, Sata announced that his government would remove consumer subsidies on fuel and reduce production subsidies to maize millers and maize inputs for farmers. He argued that subsidies did not target the most vulnerable groups in society.²⁷ This decision was supported by the World Bank and other multilateral institutions which argued that subsidies were a drain on public resources and a distortion to the economy. The multilateral organizations supported redistributing wealth to the poorest citizens through better targeted programmes such as cash transfers.

In the R-SNDP, the PF government identified agriculture development as a critical sector for achieving inclusive growth and poverty reduction (GRZ, 2014: 8). The government also emphasized the need to implement agricultural policies that were not focused on maize production at the expense of other crops (*ibid.*). According to the PF, a failure to diversify to other crops (which was attributed to an emphasis on maize to achieve national food security) had limited the potential for small scale farmers to produce other crops that could sustain them financially (PF, 2011: 13-14).

²⁷ Media statement on the removal of subsidies issued by George Chellah, Special Assistant to the President, Press and Public Relations, 15 May 2013, www.statehouse.gov.zm [2015, May 15].

To address the challenges associated with FISP (which were also of concern for international donors including World Bank), the government introduced an electronic version of FISP (known as e-FISP) that was introduced in October 2014, during the presentation of the 2015 national budget.²⁸ Subsequently, the allocation to FISP more than doubled nominally, from K500 million in 2014 to about K1.1 billion in 2015. The traditional FISP was not abandoned but was implemented alongside the e-FISP programme, which focused on crops other than maize. Nearly 800,000 farmers were targeted by the traditional FISP in the 2015/2016 farming season and an additional 250,000 farmers were targeted via e-FISP (Mason et al., 2020: 5). In some sense, the PF reversed its earlier position on FISP by implementing a parallel programme rather than reforming it completely.

A crop forecast survey, conducted during the 2015/2016 and 2016/2017 farming seasons, provides some initial assessment of the effects of e-FISP in relation to FISP. The survey results showed that e-FISP fell short of achieving many of its objectives and its outcomes were not statistically different from those of FISP. Furthermore, some outcomes of e-FISP were even worse than those of traditional FISP. Yet the disappointing survey results were attributed to implementation challenges and lack of political will (by the Lungu administration) rather than due to fundamental flaws in the concept and design of e-FISP (Mason et al., 2020).

The PF government assumed office promising programmatic reforms to agriculture. It capped budgetary allocations to FISP for the 2012 to 2014 period, and simultaneously increased its allocations to cash transfers (by up to 700% in nominal terms) during the same period. In practice, spending on FISP far exceeded budget allocations while SCT spending (at least in 2014) was only half of the budget allocation. Sata's promises of programmatic agriculture reforms were undermined by his inability to reform FISP and by excess spending. Whilst in opposition, the PF had warned against overspending on subsidies because of the potential to distort the economy (PF, 2011: 13). Yet Sata's administration spent more on subsidies than the MMD had. It is unclear if he was unable to reform because of powerful vested interests in the supply and distribution of agriculture inputs or a desire to win the rural vote. It is very likely that it was some combination of both. Sata's agriculture agenda was much less programmatic than promised and much more consistent with macroeconomic populism.

²⁸ The 2015 national budget was the last budget prepared and presented by Sata's administration before his death in October 2014.

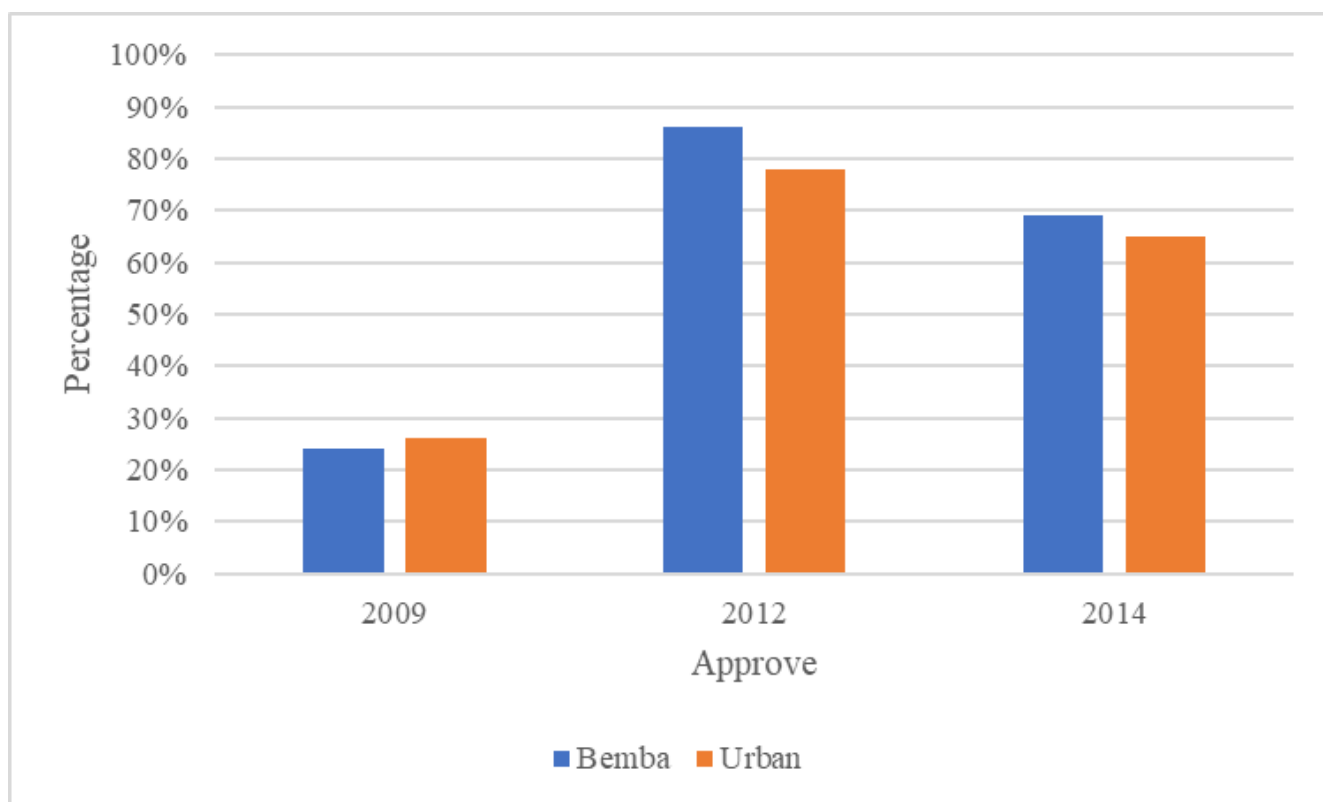
6. Popular attitudes towards the PF's economic performance

Zambia's Round 4 Afrobarometer survey conducted in 2009 showed that Zambians generally favoured high levels of state intervention (Cheeseman, Ford and Simutanyi, 2014). The survey also showed that Michael Sata was the most preferred presidential candidate at the time. This provides some evidence that PF's populist discourse resonated with voters because of Sata's embracing of a state-dominated economy and his stance against neoliberal economic reforms that appeared to benefit foreign investors at the expense of Zambians. The preceding discussion on public policy demonstrates that Sata implemented reforms to make the state more dominant in the economy. This includes the role of the IDC and RDA, reforms to put more money in people's pockets, the creation of districts, and the expansion of road, rail, and energy infrastructure.

The fifth and sixth rounds of Afrobarometer surveys, conducted in 2012 and 2014 respectively, provide evidence of Zambian citizens attitudes towards Sata's approach to economic management. The data from these two rounds were compared to the Round 4 survey to understand how popular attitudes towards Sata's economic management compared to similar attitudes towards his predecessor's administration. Sata's core support constituted urbanites and ethnic Bembas. How did these two constituencies evaluate his presidency? Afrobarometer asked respondents 'Do you approve or disapprove of the way the following people have performed their jobs over the past twelve months, or haven't you heard enough about them to say: The President?'²⁹ Figure 1 reports the findings for respondent who approved of Banda's performance in 2009 and Sata's performance in 2012 and 2014. The data are disaggregated by urban residents and respondents who identified themselves as Bembas by ethnicity or tribe.

²⁹ The response categories were: strongly disapprove, disapprove, approve, strongly approve. The 'approve' responses reported include both approve and strongly approve.

Figure 1: Performance of president: Bemba and Urban



Source: Afrobarometer surveys, 2009, 2012, and 2014

Bembas and urban residents had very low evaluations of Banda in 2009, at 26% and 24% respectively. Their evaluations of Sata in 2012 were significantly much higher, at 86% and 78% respectively. However, their evaluations of Sata had declined slightly by 2014, to 69% and 65% respectively. The results generally show that Sata's core constituencies were satisfied with his presidency. It is likely that urban residents and Bemba speakers were rewarded by Sata's policies, or at the very least, they regarded his performance as president to be much better than Banda's performance, regardless of whether they benefited directly from his policies or not.

Afrobarometer tracked citizens' perceptions about their present living conditions. The evidence in Table 2 shows that these evaluations were more positive in 2012 under Sata than they were in 2009 under Banda.

Table 2: Your present living conditions

	2009	2012	2014
Urban	%	%	%
Bad	21	13	17
Good	12	26	17
Other	4	6	6
Total	37	44	40
Rural	%	%	%
Bad	37	21	34
Good	20	30	21
Other	6	5	5
Total	63	56	60
Total	%	%	%
Bad	58	34	50
Good	32	56	38
Other	10	10	10
Total	100	100	100

Source: Afrobarometer Surveys, 2009, 2012, and 2014

Between 2009 and 2012, the percentage of respondents who reported that their present living conditions were ‘good,’ increased by 24%. By 2012, more than half of all respondents rated their living conditions as good. Of the 56% who evaluated their living conditions positively, 30% were in rural areas and 26% in urban areas. However, satisfaction with living conditions increased by 14% in urban areas compared to a 10% increase in rural areas. The data show that a year into Sata’s presidency, both urban and rural citizens had more positive evaluations of their living conditions than they had three years earlier under Banda. Yet, there was a decline in the overall levels of satisfaction with living conditions by 2014. While more than half of citizens reported that their present living conditions were good in 2012, only slightly more than a third held that position in 2014. This suggests that there was a short positive burst in evaluations of living conditions under Sata which had begun to fade by his third (and final) year in office. Nonetheless, respondents still regarded their living conditions better in 2014 than they had in 2009.

Afrobarometer also asked citizens to rate the government's economic performance on a range of issues. The data show that the PF was rated more positively on the range of issues in 2012 compared to the MMD in 2009. However, by 2014, citizens' ratings of the government's performance had declined but were still higher than the 2009 levels. Table 3 shows percentages of citizens who believed the government was handling each of the issues listed either fairly well or very well for the Afrobarometer surveys conducted in 2009, 2012 and 2014.

Table 3: Government's economic performance

Handling well	2009 (%)	2012 (%)	2014 (%)
Managing the economy	23	62	40
Improving living standards of the poor	16	43	29
Creating jobs	13	32	28
Keeping prices stable	9	33	15
Narrowing income gaps	9	29	17
Improving basic health services	36	59	54
Addressing educational needs	42	60	53
Providing water and sanitation services	34	40	39
Ensuring enough to eat	13	33	22
Fighting corruption	26	51	32
Combating HIV/AIDS ³⁰	71	81	-
Maintaining roads and bridges	35	50	64
Providing reliable electric supply	27	39	44

Source: Afrobarometer surveys, 2009, 2012, and 2014.

The 2009 survey was conducted only a year after Banda was elected and the results show that Zambians were generally dissatisfied with his government's economic performance. Only on one out of 13 issues was Banda's government believed to be performing well. Nearly three quarters of Zambians believed the government was handling combating HIV/AIDS well. Banda's government performed poorest at keeping prices stable, narrowing income gaps, creating jobs, and ensuring enough to eat. The PF's campaign promised to create jobs, lower

³⁰ This question was not asked in the 2014 survey.

taxes, and put more money in people's pockets, highlighted the areas where the MMD government was perceived to be performing very poorly.

A year after Sata was elected president, attitudes towards the government's handling of the economy were significantly better than they were in the preceding survey. On six of the 13 issues, more than half of Afrobarometer respondents reported that the government was handling the issue well. Like the MMD government, the PF's highest rating was in handling combating HIV/AIDS. Sata's administration very likely continued implementing reforms inherited from the Banda administration to address HIV/AIDS, which were proving to be popular with citizens. However, in other areas, including managing the economy, addressing education needs, improving basic health services, fighting corruption, and maintaining roads and bridges, the PF's performance was more positively evaluated than the MMD's performance. This suggests that Zambians had received greater benefits in these areas under Sata or they had more confidence in his handling of these issues than they did in Banda, regardless of the actual impact of his policies. Sata's handling of economic issues in 2012 was on average 22% higher than Banda's in 2009. Even though citizens still considered income gaps, job creation, prices and ensuring enough to eat as the worst performing areas for the PF government, the evaluations in these areas were much higher in 2012 than in 2009.

The 2014 Afrobarometer survey was conducted around the time of Sata's hospitalization and eventual death in London. The initial enthusiasm that Zambians had towards the PF government had begun to fade by his final year in office. The percentage of citizens who rated the government's handling of economic issues was on average 13% lower than in 2012 but remained on average 9% higher than the 2009 levels. By 2014, the PF was perceived to be handling three out of 12 economic issues well (a decline from six out of 13 in 2012). These were maintaining roads and bridges, improving basic health services, and addressing education needs. These areas were directly related to Sata's infrastructure agenda which focused on the construction of roads, bridges, clinics, hospitals, schools, and universities. Citizens' ratings of the handling of maintaining roads and bridges were much higher in 2014 (by 15%) than they were two years earlier. This is likely because infrastructure projects commissioned early in Sata's presidency had been completed by 2014 and Zambians were more appreciative of the physical achievements than they were two years earlier, regardless of the costs associated with the projects.

Taken together, the results from the three Afrobarometer surveys demonstrate that Zambian citizens regarded Sata's economic performance to be much better than Banda's. Sata implemented reforms that were mostly consistent with macroeconomic populism and that appear to have resonated more with Zambians than the MMD's more cautious approach. This suggests that Zambians may be

more supportive of policies that emphasize economic growth and redistribution notwithstanding the risks to long-term economic stability. This is consistent with the view that Zambians generally support high levels of state intervention (Cheeseman, Ford & Simutanyi, 2014). Yet, evaluations of Sata had declined by 2014. This may indicate that the initial burst of enthusiasm created early in Sata's presidency could not be sustained in the long-term.

7. Conclusion

President Sata died on 28 October 2014, just over three years after assuming power. Sata was renowned for his use of populist mobilization strategies to unseat an incumbent government. How, then, did Sata's populism inform public policy? Did the PF's discourse of populism change when the party formed government? How did PF differ from its predecessors in terms of economic management? Did the PF, in either vision or practice, have a broader vision of development?

Sata won elections in 2011 promising to achieve pro-poor growth that would benefit Zambians in villages and urban townships, unlike the MMD's neoliberal approach that he claimed benefited some foreign investors more than Zambians. He had also promised to lower taxes, create jobs and put more money in people's pockets. Early into his presidency, Sata fulfilled these campaign promises by implementing wage and tax regulations aimed at increasing disposable incomes. However, the direct beneficiaries of these reforms were formal economy workers and not his core supporters, namely urban informal economy workers and ethnic Bemba speakers in the rural north of the country. Sata also set out to implement programmatic reforms including the expansion of social cash transfers and reforms to improve agriculture subsidy programmes, that would both benefit rural Zambians. Yet by the final year of his presidency, SCTs were underfunded, and the government reversed course regarding input subsidies which it implemented at a very high cost. Sata's administration also spent excessively on induced by-elections to broaden his majority in parliament. A crucial feature of Sata's presidency was infrastructure development which was meant to create jobs and promote economic development. In practice, infrastructure projects were funded by borrowing, against the advice of international donors and opposition MPs who warned against the threat of another debt crisis.

Sata's approach to economic management is not surprising given that opposition leaders, who unseat incumbent presidents, face pressure to deliver more public services than their predecessors. This is because changes of government signal that voters' demands and expectations were not satisfied by the previous government, which requires the new government to make policy adjustments (Carbone & Pellegata, 2017: 1973). Moreover, because Sata won power based on populist appeals to deliver development with 'speed and force,' he was more inclined to implement costly infrastructure reforms against the advice of some of

his own close associates (Scott, 2019: 151). Sata was also unable to contain spending on infrastructure development projects that were often implemented at inflated costs. Neither was he able to contain spending on farm input subsidies. Infrastructure projects and farm subsidies are believed to have provided an opportunity for Sata to reward powerful PF factions that supported his rise to power (Siachiwena, 2020).

When Sata was elected in 2011, Cheeseman, Ford and Simutanyi (2014) warned that his election posed a populist threat to Zambia. Their assessment was informed by two main factors. Firstly, Afrobarometer surveys showed evidence that Zambians generally supported high levels of state intervention. Secondly, Sata had promised quick reforms and strong state intervention to address economic challenges. The pressure on Sata to satisfy the demands of Zambians would provide incentives for him to promote unsustainable spending that would provide short term benefits to citizens and undermine long-term economic sustainability. These two features also explain why Kaunda's version of statist development faltered by the 1980s (Cheeseman, Ford & Simutanyi: 341). Yet, Zambians remained supportive of populist policies. On the one hand, they blamed individuals and political parties, and not state intervention, for economic failures. On the other hand, they still yearned for the development that UNIP promised at independence, that encouraged ordinary citizens to depend on the state to address economic challenges (*ibid.*: 349-350). It is instructive, therefore, that Zambians evaluated Sata's economic performance more positively in 2012 than they had evaluated Banda's in 2009. However, the evaluations were in decline by 2014 but still higher than 2009 levels.

The effect of Sata's policies suggest that his development agenda, predicated on external borrowing with little regard for fiscal discipline, may have been harmful to the Zambian economy. Economic growth slumped while national debt increased during his presidency. By September 2016, the PF government (now headed by Lungu) had begun drafting an economic recovery programme which included a set of measures to restore macroeconomic stability, and which emphasized the need for the government to engage the IMF for a bailout. In December 2020, the government was struggling to meet debt interest payments and was on the brink of debt default.³¹ Zambia had effectively wiped off its debt in the mid-2000s after reaching the HIPC completion point. Nearly 10 years after PF was elected, Zambia was faced with an unsustainable debt burden. In this regard, Sata economic reforms were consistent with macroeconomic populism in Latin America, and European countries such as Greece. These policies had provided short term benefits by promoting expansionary fiscal policies and

³¹ BBC News, 'Zambia on brink of debt default,' 13 November 2020. Retrieved from <https://www.bbc.com/news/world-africa-54928836> [2021, January 24].

redistribution to ruling party supporters, while undermining long-term economic stability

African populism in power is associated with poor economic management. In South Africa, Zuma was elected based on populist strategies and his presidency was associated with poor economic management and economic decline (Desai, 2018). African populists in the 1980s such as Museveni and Rawlings had also supported state intervention but abandoned this course in favour of IMF and World Bank neoliberal economic reforms after facing economic crises. Amongst Africa's third wave populist leaders, Sata arguably had more in common with Magufuli – despite the latter's contested classification as populist. Both Sata and Magufuli emphasized industrial development strategies that focused on infrastructure development. Moreover, both leaders attempted to recreate the statist development models that were implemented in the post-independence era in Zambia and Tanzania by Kaunda and Nyerere, respectively. The cases of Sata and Magufuli suggest that African populists may have broader visions of development than hitherto acknowledged in the African populism literature.

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