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Policy Reform After Structural Adjustment in Zambia: The Politics of Restoring a Statist Development Agenda, 2011–2014

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Abstract

Michael Sata's presidency in Zambia (2011–14) marked a notable attempt to revive statist development ideas rooted in the country's postindependence era. While the preceding MMD government had begun reintroducing limited state intervention, its commitment remained constrained. Sata, by contrast, articulated a more assertive vision of state-led development, echoing the UNIP-era model under Kenneth Kaunda. Drawing on policy documents, speeches, and survey data, this article situates Sata's politics and policies within broader public dissatisfaction with neoliberal reforms and highlights enduring tensions in Africa's poststructural adjustment era between market-oriented policies and demands for greater state involvement.

Résumé

La présidence de Michael Sata en Zambie (2011–2014) a marqué une tentative notable de raviver les idées de développement étatiste enracinées dans l'ère postindépendance du pays. Bien que le précédent gouvernement MMD ait commencé à réintroduire une intervention limitée de l'État, son engagement est resté réduit. Sata, quant à lui, a exprimé une vision plus affirmée du développement orchestré par l'État, faisant écho au modèle de l'ère UNIP sous la présidence de Kenneth Kaunda. En s'appuyant sur des documents politiques, des discours ainsi que des données d'enquête, cet article contextualise la politique et les stratégies de Sata au sein d'un cadre plus vaste d'insatisfaction du public vis-à-vis des réformes néolibérales, tout en mettant en lumière les tensions persistantes dans l'ère post-ajustement structurel en Afrique, entre les politiques axées sur le marché et les revendications d'une plus grande intervention de l'État.

Resumo

Uma das marcas da presidência de Michael Sata na Zâmbia (2011-2014) foi o forte empenho em recuperar as ideias de desenvolvimento alicerçado no Estado, as quais têm as suas raízes no período pós-independência do país. Embora o anterior governo, chefiado pelo partido MMD (Movement for Multiparty Democracy), tivesse dado início à reintrodução de um papel mais interventivo do Estado, nunca se empenhou verdadeiramente nessa via. Sata, pelo contrário, defendeu uma visão mais assertiva de desenvolvimento liderado pelo Estado, fazendo eco do modelo adotado sob a UNIP de Kenneth Kaunda. Com base em documentos políticos, discursos e dados obtidos através de inquéritos, este artigo situa a política e as políticas de Sata no âmbito de uma insatisfação pública mais ampla com as reformas neoliberais e destaca as tensões que, numa época de ajustamento pós-estrutural em África, continuam a imperar, entre políticas orientadas para o mercado e exigências de maior envolvimento do Estado.

Keywords: neoliberalism; structural adjustment; statism; Michael Sata; Zambia

Introduction

In September 2011, Zambia held its fifth general elections since the reintroduction of multiparty democracy in 1991. The 2011 electoral contest resulted in the election of President Michael Sata and his Patriotic Front (PF) party, which ended the twenty-year rule of the governing Movement for Multiparty Democracy (MMD). Before he was elected president, Sata garnered significant scholarly attention for adopting populist election strategies that incorporated the successful mobilization of urban voters and his rural co-ethnics in the north of Zambia (Larmer and Fraser 2007; Cheeseman and Hinfelaar 2010; Resnick 2014; Cheeseman and Larmer 2015; Sishuwa 2024). Hitherto, Sata's characterization as a populist—based on Ernesto Laclau's (2005) description of populism as a particular logic of articulating demands without expression within the existing political framework—has dominated how scholars have understood his politics (Larmer and Fraser 2007; Sishuwa 2024). Yet, the narrow framing of Sata as a populist overlooks Zambia's broader social and economic context in the 2000s, and the tensions between the MMD's commitment to neoliberal market reforms and the PF's support for statist development strategies.

Sata's politics and his presidency (from his election in 2011 to his death in office in 2014) are significant for understanding Zambia's recent history of policy reforms on one hand, and the broader political economy of development in Africa since the advent of neoliberal economic reforms on the other. The wave of democratization that swept across the continent in the early 1990s had significant implications for economies on the continent. Most countries of sub-Saharan Africa experienced a permanent state of economic crisis between the 1970s and 1990s, usually under authoritarian regimes that implemented statist economic development models (Abrahamsen 2000; van de Walle 2001; Bleck and van de Walle 2018). In one country after another, including Benin, Cabo Verde, and Malawi, the return to multiparty democracy in the early 1990s resulted in the election of new leaders who unseated entrenched incumbents who had run down economies. Democratization was typically accompanied by structural

adjustment programs (SAPs) implemented under the auspices of the International Monetary Fund (IMF) and the World Bank with the aim of economic stabilization. SAPs often conflicted with the interests of the poor due to their emphasis on economic liberalization and neglect of social issues (Abrahamsen 2000; van de Walle 2001; Mkandawire 2004). By the 2000s, however, economic growth had returned, supported by significant debt relief through initiatives such as the Highly Indebted Poor Countries Initiative (HIPC) and the Multilateral Debt Relief Initiative (MDRI) (Djimeu 2018). Yet, the political and policy implications of the poststructural adjustment period remain underexplored. In Zambia, renewed growth and debt relief in the 2000s allowed the PF under Sata to revive elements of state-led development previously constrained by neoliberal reforms. This shift also reshaped electoral dynamics and raised public expectations for a more interventionist and responsive state.

This article argues that Sata's brand of populist politics was not devoid of ideological content or broader ideas about development. The PF came to power in 2011, just months after the World Bank reclassified Zambia as a lower middle-income country (LMIC). This new status expanded Zambia's access to revenue sources, including international financial markets, which the Sata administration drew upon to finance its ambitious development agenda. Sata's program in government amounted to an attempt to restore an era of statist development implemented in the immediate postindependence era under the regime of the first republican president, Kenneth Kaunda, and his United National Independence Party (UNIP). Sata constructed his program as a revival of strong state intervention manifested by measures to reestablish or renationalize certain strategic enterprises, expand the provision of state-supported social welfare, and invest in physical infrastructure projects. These aspects were central features of UNIP's socialist agenda. This contrasted with the approach adopted by the MMD, which presided over budget cuts and the reduced role of the government in shaping economic strategies at the expense of supporting social sectors (Abrahamsen 2000).

The argument presented in this article is based on an analysis of documents including party manifestos, presidential speeches to parliament, national budget addresses, and national development plans. The documents illustrate that both the MMD (between 2006 and 2011) and PF (2011 to 2014) governments recognized the importance of strong state intervention to address the country's socioeconomic challenges. Nonetheless, the PF was more committed to—or at least had more fiscal capacity for—restoring a statist development agenda than the MMD, which became more interventionist after the 2006 elections. The PF's strong electoral performance in 2006, informed by its campaign promises centered on increased state involvement in the economy, impelled the MMD to embrace some of Sata's ideas, such as reforms to the mining tax regime (Fraser and Lungu 2007; Lundstøl and Isaksen 2018). While SAPs may have been essential for economic stability, most Zambians felt that poverty and inequality worsened in the 2000s, after the structural adjustment period in the 1990s, compared to the time before neoliberal policies. Many Zambians, especially those in the economically strategic Copperbelt region, yearned for a return to strong state intervention last seen during the UNIP era (Mususa 2021). Sata understood the

disjuncture between the expectations of prosperity among Zambians in the early postindependence period and the economic hardship that followed under neoliberal reforms. Biographical accounts of Sata suggest that he shared a nostalgia for UNIP's statist policies with urban Zambians, in large part because his early political career was shaped by his experiences under the lengthy rule of Kaunda (Ruwe 2014; Sishuwa 2021, 2024). Sata did not associate himself with neoliberal orthodoxy even though he had served as a senior ranking member of the MMD from 1991 to 2001 (Sishuwa 2021, 2024).

This article begins by examining the concept of statism and its importance in Africa's postindependence development agenda. It then explores how SAPs in the 1990s affected democracy and weakened state capacity in countries like Zambia. The section that follows traces Zambia's shift from a statist model in the 1960s to neoliberal economic reforms in the 1990s. Drawing on Afrobarometer data and qualitative studies, the article then highlights public dissatisfaction with post-adjustment conditions and a desire for stronger state involvement. The penultimate section analyzes salient policy reforms under Sata's presidency, followed by a conclusion that situates his politics within broader debates on development in post-adjustment Africa.

Three important caveats should be noted regarding the approach taken in this article. First, it does not seek to contribute to the literature on populism or to debate whether Sata should be described as a populist based on his policies in government. Second, the analysis does not suggest that external actors and events no longer constrain African states. Rather, the article is concerned with the consequences of SAPs that were dominant in the 1990s and the broader tensions between these specific neoliberal reforms and statist development. Finally, the article focuses on how Sata and the PF characterized their agenda in ways reminiscent of UNIP's program, rather than the extent to which they implemented it. It focuses on the performative character of the policies and not their objective outcomes.

A brief history of statist development in Africa

Statism refers to an approach to governance and economic development in which the state is central in directing economic activity, regulating markets, and managing strategic industries. The concept is related to debates in the literature on developmental states, which emphasize the formation of strong, autonomous state institutions capable of steering development while remaining embedded in society through close ties with private actors (Evans 1995). In statist development models, governments often assume ownership of strategic sectors such as mining, energy, banking, and transport, and actively intervene in the economy to promote industrialization, social welfare, and infrastructural development (Wade 1990).

At independence, African states inherited economies that were structurally dependent, underdeveloped, and externally controlled (Akyeampong 2017; Decker and McMahon 2020; Gumede 2023). Under colonial rule, African economies had been oriented toward extracting and exporting raw materials, with

minimal investment in local infrastructure, manufacturing, human capital, or social welfare (Rodney 1972). Thus, statism in Africa emerged out of necessity for newly independent states. Many African leaders adopted state-led development to rapidly industrialize, fast-track modernization, achieve self-reliance, redistribute resources more equitably among citizens, and reduce dependency on former colonial powers (Ake 1996; Mkandawire 2001; Lal 2012). During the independence decade, several countries pursued “African socialism” as a model for development. The variants of African socialism placed the state at the center of driving economic growth. States promoted centralized planning and expanded spending on infrastructure to stimulate growth and consumption (Akyeampong 2017). This was the case in Ghana under Kwame Nkrumah, Guinea under Sekou Touré, Senegal under Léopold Senghor, and Tanzania under Julius Nyerere (Akyeampong 2017, 4). While African countries did not achieve the same level of success as those in Asia, some African countries were “developmentalist” in the early decade of independence (Mkandawire 2001). They were “developmental” in their ideological inclinations, and implementation of policies that produced relatively high growth rates, and social welfare gains (Mkandawire 2001, 310).

Claude Ake (1996) argued that while these “command economies” were rooted in genuine efforts to achieve development and national cohesion, they often resulted in authoritarianism and inefficiency. Similarly, Thandika Mkandawire (2001) argued that early postcolonial states had genuine developmental ambitions and made tangible progress in certain areas, even if ultimately derailed by external shocks and internal weaknesses. Countries on the continent had promoted expansionary fiscal spending financed by high commodity prices and external borrowing, but were confronted by a collapse in world prices of primary agricultural commodities, which constituted about 90 percent of sub-Saharan Africa’s exports in the 1970s (Archibong, Coulibaly, and Okonjo-Iweala 2021, 133). This resulted in a precipitous shortfall of export revenues and a negative balance of payments (van de Walle 2001; Archibong, Coulibaly, and Okonjo-Iweala 2021). By the 1980s, many African countries faced dysfunctional economies, prompting scholars to label this period as Africa’s “lost decade” (Mkandawire 2010).

Despite these setbacks, the legacy of statism remains significant in Africa’s political economy. Since the 2000s, debates about the developmental state in Africa have revisited these legacies, particularly as rising dissatisfaction with neoliberal reforms prompted calls for renewed state involvement in economic planning and the redistribution of wealth to citizens (Mkandawire 2001; Gumede 2019).

Structural adjustment, democracy, and economic policy in Africa

In response to the economic challenges of the 1980s, African states became increasingly dependent on IMF and World Bank support to stabilize their economies (Collier and Gunning 1999). The austerity measures promoted by the Bretton Woods institutions were at odds with the interests of Africa’s socialist leaders, who often reneged on reforms such as removing food production and consumption subsidies (van de Walle 2001). Nonetheless, reneging on

SAPs did not reverse the economic malaise. Moreover, most African countries were led by one-party dictatorships, which deprived their citizens of the opportunity to elect leaders who could promote alternative policies. Thus, by the start of the 1990s, there was a popular demand for economic and political reforms.

The rise of the Washington Consensus in the late 1980s and the collapse of communism following the dissolution of the Soviet Union in the early 1990s profoundly affected democracy and economic policy in Africa. Multiparty democratic elections were held across the continent during the early 1990s, resulting in electoral turnovers in some countries. Outgoing leaders bequeathed economic crises to their successors, and the latter invariably turned to the IMF and World Bank for macroeconomic support. Yet, the conditions that came with SAPs in the 1990s severely limited the policy choices of Africa's new democracies (Mkandawire 2004). Political leaders prioritized donor demands to guarantee more aid, rather than the wishes of citizens (Mkandawire 2010). By default, African countries became societies that could elect their leaders but could not choose what policies could be implemented, a situation Mkandawire described as "choiceless democracies" (Mkandawire 2004, 141). Donor insistence on good governance and economic liberalization meant that citizens were deprived of the opportunity to choose competing visions of democracy or alternative economic policies (Abrahamsen 2000). Ideas of African socialism and developmentalist policies were marginalized in favor of austerity measures. Further, the state's role was significantly restricted to avoid market distortions (van de Walle 2001).

Official donor reports suggest that by the late 1990s, adjusting countries had achieved macroeconomic stabilization, as reflected in indicators such as lower inflation and more stable exchange rates (Stein and Nissanke 1999). Yet, by the early 2000s, economic liberalization and democratization had resulted in more suffering and hardship for most African citizens (Mkandawire and Soludo 1998). SAPs had a weak focus on social sectors such as agriculture, which suffered a severe decline, leading to increased food prices (Mkandawire and Soludo 1998). Employment in crucial sectors like manufacturing also plummeted during this period (Mkandawire and Soludo 1998, 56–59). Even in South Africa, where neoliberal reforms were adopted after apartheid without adhering to SAPs, liberalization led to the downfall of a lucrative textile industry and massive job losses (Natrass and Seekings 2019). The increase in poverty, inequality, and vulnerability in Africa was recognized as an urgent problem by international development policymakers. These dynamics influenced global anti-poverty efforts in the 2000s, including the United Nations' adoption of the Millennium Development Goals and the expansion of social safety nets supported by development aid agencies.

One crucial feature of SAPs was massive debt relief in the 2000s under the HIPC and MDRI initiatives. Nearly thirty sub-Saharan African countries were on the HIPC list. They achieved substantial debt relief after adhering to various IMF and World Bank reforms, including the strict adoption of market liberalization policies and the formulation of Poverty Reduction Strategy Papers (Archibong, Coulibaly, and Okonjo-Iweala 2021). Between 2001 and 2012, the average debt level as a percentage of gross domestic product reduced from 110 to 36 percent (Archibong, Coulibaly, and Okonjo-Iweala 2021). The combination of lower

inflation, debt relief, and China's demand for Africa's natural resources contributed to increased export-led growth after 2000. Substantial gains in democracy were also recorded in Africa during the 2000s, with an increase in countries holding democratic elections and turnovers in Benin, Ghana, Kenya, and Senegal, among others (Beardsworth, Siachiwena, and Sishuwa 2022). The combination of increased electoral competition, electoral turnovers, and resurgent growth incentivized citizens to demand more social services such as improved access to education and healthcare (Carbone and Pellegata 2017).

Zambia's development trajectory was like that of other adjusting countries. After reaching the HIPC completion point in 2005, it received massive debt relief, translating to 63 percent of its external public debt (IMF 2005). Nonetheless, any perceived gains from debt relief did not adequately trickle down to citizens. In the 2006 elections, Sata's PF won the popular vote in the main urban centers of the Copperbelt and Lusaka with promises to increase mining taxes, protect the interests of workers, and redistribute wealth more equitably to citizens (Fraser and Lungu 2007; Lundstøl and Isaksen 2018). Although the PF lost the national vote, MMD leaders recognized the need to embrace some of Sata's ideas. They implemented significant mining reforms in 2008, such as a mining windfall tax, to be more interventionist than they had been in the preceding fifteen years (Fraser and Lungu 2007; Lundstøl and Isaksen 2018). Nonetheless, the MMD reversed aspects of its mining reforms in 2009 amid an internal change of leadership and the global financial crisis (Lundstøl and Isaksen 2018). For the rest of the 2000s, the MMD presided over a stable economic growth trajectory culminating in Zambia's graduation to the World Bank's LMIC status in July 2011. The country grew from a gross national income (GNI) per capita of US\$310 in 2000 to US\$1,070 in 2010.¹ Graduation to LMIC status allows a country to borrow at higher interest rates, including from financial markets, thereby broadening the financing options available to the state. The following section discusses the centrality of statism in Zambia's development history before explaining why it resonated with a significant proportion of the population by the 2000s.

Statism and neoliberalism in Zambia

At independence in 1964, Zambia's economy had a significant presence of foreign-owned enterprises, including British and South African multinationals and Indian traders who owned retail stores in rural areas (Macmillan 2009). Following major economic reforms from 1968 to 1970, the UNIP government adopted a statist development approach that remained in place until the defeat of Kaunda in 1991 (Ailola and Kalula 2001). The statist development agenda was informed by Kaunda's philosophy of humanism, which is a variant of socialism.

Kaunda's statism had at least four essential features. First was state ownership of strategic economic sectors. The state acquired a 51 percent controlling stake in retail, mining operations, and financial institutions, including banks, building societies, and insurance companies (Ailola and Kalula 2001). Hitherto, these operations were controlled mainly by foreign multinational corporations. The nationalization initiative included the establishment of new industries as part of an import substitution strategy and efforts to build a developmental state

(Rakner 2003). The second feature involved *Zambianization*. This referred to a deliberate strategy of “Africanizing” the civil service (Noyoo 2013). It also included phasing out white workers in various positions in mining companies and replacing them with indigenous Zambians—a process that was primarily achieved by the mid-1970s (Money 2020). Further, the state proscribed traders of foreign origin (mainly those of Indian heritage) from operating retail businesses in rural areas (Macmillan 2009). The sector was reserved for indigenous Zambians instead.

State ownership of productive sectors of the economy gave rise to the third and fourth features of the statist development agenda. The third feature included establishing a welfare state, financed by revenues from the productive sectors of the economy under state control. Welfare provision included universal coverage of healthcare and education. Other features were food and agricultural production subsidies, price controls, and the implementation of a public welfare scheme targeted at poor Zambians (Noyoo 2013). Finally, the state invested in infrastructure development, such as roads, bridges, schools, hospitals, and airports (Noyoo 2013). Extensive infrastructure projects were undertaken nationwide, particularly between 1964 and 1975. During this period, copper accounted for 95 percent of export earnings and 45 percent of government revenues (Government of the Republic of Zambia [GRZ] 2006). This meant that there was plenty of money for capital expenditure at a time when physical infrastructure was considered the primary constraint to economic development (Scott 2019).

The benefits of the statist development agenda were short-lived. Between 1975 and 1990, Zambia experienced a 30 percent decline in real per capita growth (Rakner 2003). This was caused by a sharp fall in copper prices that began in 1974 and coincided with an enormous increase in global oil prices (Rakner 2003). The government responded to the economic crisis by borrowing from the IMF and private creditors. Despite government efforts to refinance their way out of growing balance of payments deficits, the Zambian economy continued to deteriorate. As copper revenues declined and overall economic conditions worsened, the state’s infrastructure plans were curtailed. The last fifteen years of UNIP rule were characterized by abandoning public welfare assistance and a general decay in physical infrastructure. As a result, roads, bridges, schools, hospitals, and other infrastructure fell into “disrepair and dilapidation” (Noyoo 2020, 262). The UNIP government attempted to implement IMF-supported structural adjustment reforms in the 1970s and 1980s to stabilize the economy, but it balked at the idea at least twice when the conditions attached to the reforms became too stringent for the government and unpopular with citizens (Rakner 2003).

The election in 1991 of President Frederick Chiluba and his party, the MMD, resulted in the adoption of neoliberal economic reforms to address the failures of the UNIP era. The reforms included large-scale privatization of state-owned enterprises such as the Zambia Consolidated Copper Mines (ZCCM) (GRZ 2006). At the start of the new millennium, the mining sector’s contribution to the economy had reduced to 6 percent from 33 percent in 1973 (GRZ 2006, 59). Moreover, at the end of UNIP rule in 1991, Zambia was heavily indebted with an external debt stock of US\$7.2 billion (Rakner 2003). The MMD spent its first ten years in power highly dependent on international donor support.

Among the significant implications of the 1990s economic crisis is that many Zambians employed in the public sector lost jobs because of the privatization and liquidation of state-owned enterprises. In rural areas, incomes plummeted because food production subsidies were eliminated in favor of agricultural liberalization. The liberalization of agriculture, combined with the effects of a devastating drought in 1992, exacerbated problems of food insecurity (Rakner 2003, 69). This resulted in a mass exodus of Zambians from villages to Lusaka in search of economic opportunities (Resnick 2014). Rural-urban migration only added to the social and economic challenges in urban areas, especially as the government lacked the financial resources to invest in physical infrastructure. In the housing sector, for example, 80 percent of all housing units were informal and poorly serviced by 2001 because the state had been unable to meet the country's housing demand since the late 1970s (GRZ 2006).

The MMD remained in power for the rest of the 2000s, first under President Levy Mwanawasa, who ruled from January 2002 until he died in office in August 2008, and then under Rupiah Banda, vice president from 2006 to 2008, who led from Mwanawasa's death until September 2011. During this second and last decade of MMD rule, there was a strong focus on mitigating corruption, controlling inflation, and balancing the budget (Cheeseman, Ford, and Simutanyi 2014). Mwanawasa's administration had also reintroduced national development planning and benefited from increased Chinese foreign direct investment that grew exponentially between 2000 and 2006 (Kamwanga and Koyi 2009). Mwanawasa's administration also revised the mineral tax regime in 2008. This was in response to the PF's 2006 promises to reform the mining sector and to address the lopsided Development Agreements signed by the government and private mine owners during the privatization of ZCCM (Fraser and Lungu 2007). The mining reforms increased mineral royalty from 0.6 percent to 3 percent, corporate income tax from 25 percent to 30 percent, and introduced a windfall tax (Lundstøl and Isaksen 2018). However, Banda's administration abandoned the windfall tax in 2009. Two arguments have been advanced to explain the reversal of this tax. The first is because the price of copper fell by 50 percent during the global financial crisis, and the second was due to alleged business relationships between Banda's family and mining industry firms that opposed the tax (Lundstøl and Isaksen 2018).

Despite the MMD's economic reforms, living conditions for the underprivileged did not improve much. There was also a widespread perception that the privatization of the mines benefited foreign multinationals at the expense of citizens, even as copper prices surged (Resnick 2014; Mususa 2021). As a result of these conditions, there was a longing for a return to the postindependence welfarist and statist Zambia that had existed before the lost decade and the rise of neoliberalism.

Nostalgia for a pre-neoliberal statist development agenda

The period from the 1950s to the 1970s—the late colonial period to the immediate postindependence years—is often referred to as Zambia's “golden era”

(Mususa 2021). For residents of the Copperbelt region, the golden era is associated with a period of decent subsidized housing, good schools, health facilities, recreation in sports clubs, theaters, and cinemas, and decent wages that encouraged savings (Mususa 2021). By the end of the “lost decade” (late 1980s), there was a strong sense among residents on the Copperbelt that the idea of a prosperous Zambia was one relegated to the past and never to return (Ferguson 1999, 13). These sentiments only grew stronger during the 1990s as Zambia’s economic hardships moved from bad to worse.

Although economic liberalization had begun in the early 1990s, the MMD deferred the privatization of ZCCM until after 1996, fearing political backlash during the first term of their rule (Rakner 2003; Mususa 2021). In a study on life among former miners conducted in the mid- and late 2000s, residents in a Copperbelt town were nostalgic for the “good life” before privatization. They reminisced about a lifestyle that evoked middle-class aspirations, including leisure and recreational activities such as golf and swimming (Mususa 2021). In the aftermath of privatization, many miners were retrenched, waiting for terminal benefits and facing financial and psychological distress (Mususa 2021). The nostalgia for better times on the Copperbelt was not isolated but reflective of a broader sentiment across the country. By the mid-2000s, Zambia had experienced nearly thirty years of sustained economic deterioration. At this point, older Zambians were nostalgic for the developmental years between 1964 and 1974, while both older and younger Zambians alike yearned for a time when a strong state would emerge to restore the “promise of independence” that was truncated in the mid-1970s (Cheeseman, Ford, and Simutanyi 2014).

The nostalgia for statism is supported by evidence from a nationally representative Afrobarometer survey (with a margin of error of ± 2.5 percent) conducted in 2009. The survey included the question: “Which of the following statements is closest to your views?” Among the statements presented to the respondents include the following: (a) *the costs of reforming the economy are too high: the government must abandon its current economic policies*; (b) *the government’s economic policies have hurt most people and only benefitted a few*; and (c) *the government should retain ownership of its factories, businesses and farms*. The survey further asked: “As you may know, the government has reduced its role in the economy, for example by privatizing mining companies. Overall, how satisfied are you with the way this policy works?” Figure 1 reports the percentage of respondents who provided positive responses to any of the three statements or the question concerning satisfaction with MMD policies on issues such as privatization.²

Figure 1 shows that by 2009, nearly half of the surveyed Zambians felt that the costs of neoliberal economic reforms were too high and believed that the government should abandon them. This contrasted with 41 percent who supported a second and contrasting statement that asked respondents if they agreed that some economic hardships were necessary in the present to guarantee a better economy in the future. When asked if government economic policies had hurt most people and only benefited a few, or if most people had been helped and only a few had suffered, about eight in ten surveyed respondents believed that most people had been hurt. Respondents were also asked to choose between a statement supporting the nationalization of businesses and the privatization of

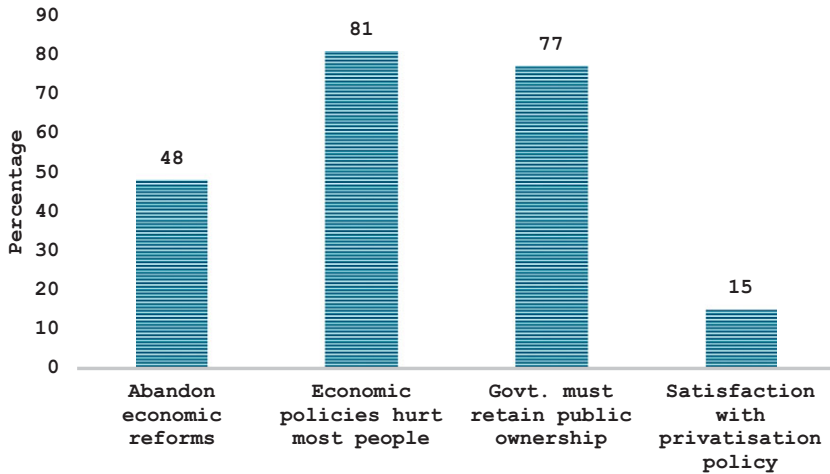


Figure 1. Attitudes towards economic policy in 2009.

Source: Afrobarometer survey, Round 4, 2009. The Afrobarometer survey dataset can be found at: <https://www.afrobarometer.org/survey-resource/zambia-round-4-data-2009/>

firms from the state to companies and individuals. Nearly eight in ten (77 percent) agreed that the government must retain ownership of state businesses and farms. This is noteworthy because between 1992 and 2001, 254 state-owned companies had been privatized out of a privatization portfolio of 278 (Rakner 2003, 74). Thus, it is not surprising that 85 percent of surveyed respondents were unsatisfied with the government's privatization efforts.

Zambians were dissatisfied with economic conditions in the 2000s, but who did they blame for the country's problems? The 2009 Afrobarometer survey included the question: "In your opinion, who is responsible for the current economic conditions in Zambia?" While respondents could choose from eleven responses,³ Figure 2 collapses them into five categories: the UNIP government of Kaunda, the MMD government of Chiluba, the MMD government of Mwanawasa, the MMD government of Banda, and international actors (including the IMF, World Bank, and foreign investors).

Figure 2 shows that in 2009, about four in every ten surveyed Zambians (43 percent) blamed the economic problems prevailing at the time on Chiluba's MMD government, which initiated the economic liberalization reforms. This was 11 percentage points higher than those who blamed the then-incumbent, Banda, for the problems. At 7 and 8 percent, respectively, a relatively equal percentage of respondents blamed the economic challenges on international actors such as the IMF and World Bank and Mwanawasa's MMD government. Only 1 percent blamed the problems on Kaunda's UNIP. It is possible that the age of the respondents can explain the low attribution of the issues to the Kaunda government. Only 32 percent of the 1,200 respondents would have been eighteen years or older when Kaunda was defeated in 1991, while 62 percent would have been seventeen or younger. Nevertheless, the attribution of problems to Chiluba's government is consistent with the evidence provided by Ferguson (1999) and Mususa (2021), who

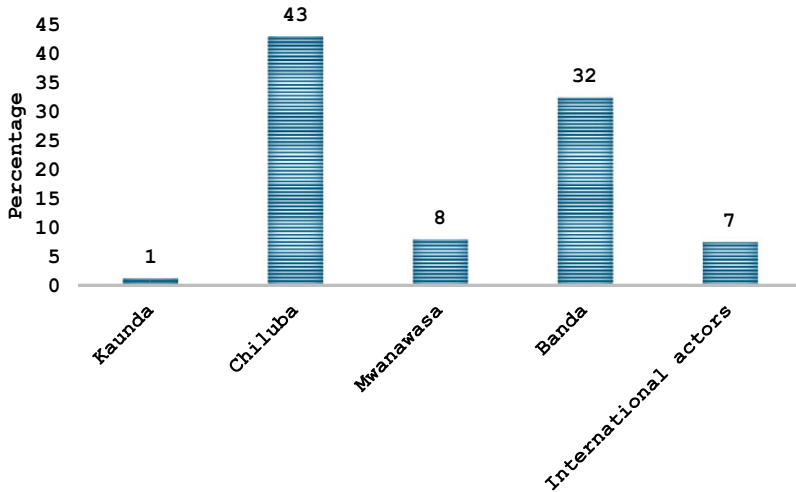


Figure 2. Responsibility for economic problems in 2009.

Source: Afrobarometer survey, Round 4, 2009.

observed that Zambians on the Copperbelt were nostalgic about the golden era and dismayed by economic liberalization. Cheeseman, Ford, and Simutanyi (2014, 350) argued that UNIP's *modus operandi* had encouraged ordinary Zambians to look to the state to resolve their economic difficulties. This legacy is supported by anecdotal still today. It is common to hear older Zambians refer to the Kaunda era as "the good old days," in contrast to social and economic conditions since the turn to multiparty democracy and neoliberalism.

When Sata emerged as an opposition leader in late 2001, there was a deep sense of nostalgia for the "good old days" among Zambians. While scholars have described Sata's politics in the 2000s as populist, I argue that Sata's political strategy reimagined the first decade of Zambia's postcolonial era of statist developmentalism. In power, Sata attempted to restore a statist development agenda to distinguish himself from his MMD predecessors. Three features of his agenda are noteworthy because of the performative character with which they departed from MMD policies and mirrored aspects of Kaunda's statist development agenda. These are efforts to assert more control over strategic enterprises, the expansion of social protection, and massive investments to improve the country's physical infrastructure.

Sata's development agenda in power

Michael Sata's presidency was brief but included notable reforms that signaled his intention to be more interventionist than his immediate predecessors. Some PF policies were necessarily path-dependent, building on reforms initiated by the MMD government. Nonetheless, the performative character of Sata-era reforms showed that the PF's agenda was reminiscent of the UNIP approach to development.

Reforms to strategic economic sectors

Sata was an outspoken critic of privatization deals of the 2000s. This included the 2006 partial privatization of the state-owned Zambian National Commercial Bank (ZANACO) and the 75 percent sale of the Zambia Telecommunications Agency (ZAMTEL) to a Libyan firm in 2010 (Siachiwena 2021). In power, Sata's government reversed the sale of ZAMTEL, which urban Zambians had opposed, restoring it to its position as a wholly state-owned enterprise. Its reversal demonstrated Sata's support for more decisive state intervention and appealed to a population who had a negative assessment of the impact of privatization on society.

While Sata could not realistically renationalize or reintroduce over 250 state-owned enterprises that were privatized or liquidated in the preceding two decades, he attempted to revive a few defunct or moribund state entities. These were Zambia Railways, which received financial injections from the state, and Zambia Airways, which successfully resumed operations under his successor (Siachiwena 2021). In January 2014, the PF established the Industrial Development Corporation (IDC), chaired by Sata, to act as an active investor and shareholder in state-owned enterprises and to operationalize the government's national industrial policy (Hinfelaar and Sichone 2019, 17). Sata's IDC revived a parastatal of the same name that had operated under Kaunda's presidency before being abolished in the early 1990s.

Given Zambia's dependence on copper mining, the sector's contribution to government revenue through taxation was a critical factor in economic management. PF leaders had debated imposing higher taxes on mining firms. Still, they resisted calls to impose a 25 percent windfall tax on base metals due to Sata's inability to overcome vested interests in the mining sector (Lundstøl and Isaksen 2018). Instead, his administration increased mineral royalty from 3 to 6 percent in 2012 and introduced a linear capital allowance of 25 percent for mining operations in 2013 (Lundstøl and Isaksen 2018). These reforms did not amount to a renationalization of the mining sector but did generate additional revenue for the state at a time when copper prices were buoyant. The income from the mining sector supported the PF's investments in energy, road infrastructure, and the delivery of social services. Zambia's reclassification to LMIC status also proved advantageous for the PF, opening new funding opportunities. As a result, the government successfully issued a ten-year \$750 million Eurobond in September 2012 and a \$1 billion 10-year Eurobond in April 2014 (Kalikeka, Nalishebo, and Banda-Muleya 2019). Additionally, the PF government capitalized on a partnership with the Chinese government, granting access to "soft financing" for developing new projects (Scott 2019).

Table 1 provides a timeline of important political and economic events between 1991 and 2014. The timeline shows that reforms for increased state intervention began under Mwanawasa after Zambia reached the HIPC completion point in 2005. This coincided with increased investment from China and was followed by the PF's strong urban electoral performance in 2006. Even then, Banda's administration showed less support for state intervention than

Table 1. Zambian political and economic developments (1991–2014)

Year	Event
1991	• The MMD, led by Frederick Chiluba, is elected, ending one-party rule. • The government adopts the IMF and World Bank Structural Adjustment Programs, initiating liberalization and privatization.
1996	• Chiluba and the MMD win a second term of office.
1997	• Zambia Consolidated Copper Mines is split into smaller units and privatized. Development Agreements are signed with private mining companies.
2001	• Levy Mwanawasa succeeds Chiluba after winning the presidency for the MMD. He assumed office in January 2002.
2005	• Zambia reaches the HIPC Initiative Completion Point, qualifying for extensive multi-lateral debt relief. • The MMD government publishes the Fifth National Development Plan, focused on poverty reduction and infrastructure.
2006	• Chinese investment in Zambia reaches \$210 million, up from \$14 million in 2000 and \$41 million in 2005, largely in mining and infrastructure. • The PF wins urban support but loses the general election to the MMD; Mwanawasa is elected for a second term. • The MMD partially privatizes ZANACO bank.
2008	• The MMD government revises the mining tax regime: introduces a windfall tax (25%, 50%, or 75% based on copper prices), raises mining royalty from 0.6% (2000) to 3%, increases corporate income tax from 25% (2000) to 30%, and introduces a variable profit tax of 15%. • The global financial crisis leads to a drop in copper prices. • President Levy Mwanawasa dies in office; Rupiah Banda of the MMD becomes president, narrowly defeating Sata in a presidential by-election.
2009	• The MMD revises the mineral tax regime, abolishing the windfall tax while maintaining other taxes.
2010	• Banda's administration sells 75% of state-owned ZAMTEL to a Libyan firm.
2011	• Zambia achieves lower-middle-income country status. • The MMD government publishes its Sixth National Development Plan. • The PF wins the general election; Michael Sata becomes president. • Sata reverses the sale of ZANACO, announcing plans to revive Zambia Railways and Zambia Airways.
2012	• The PF government issues Zambia's first Eurobond of \$750 million for infrastructure investment and increases the mining royalty rate from 3% to 6%.
2013	• The PF government issues a second Eurobond of \$1.25 billion, continuing its borrowing strategy. • The PF government publishes the Revised Sixth National Development Plan.
2014	• Sata's government reestablishes the IDC to guide industrial policy. • President Michael Sata dies in office.

Mwanawasa's, which contributed to the MMD's 2011 electoral defeat (Resnick 2014; Sishuwa 2024).

While Sata's administration did not regain full control of strategic economic sectors, its reforms signalled that the PF planned to be more interventionist than the MMD. Its revival of three defunct or moribund state-owned enterprises and renationalization of a fourth further displayed a performative commitment to statism.

Expansion of social welfare

Some of the earliest reforms implemented by Sata's government addressed measures to increase disposable incomes and strengthen social security. In the PF's first national budget, presented in October 2011, the government doubled the threshold for "pay as you earn," which moved 80,000 low-paid workers, such as domestic workers and shop assistants, out of the taxable bracket (Chikwanda 2011). Reforms were also instituted to improve conditions for formal sector workers. By September 2013, the government had increased salaries for civil servants by up to 200 percent (Leslie 2016). Additional benefits were introduced for health personnel, including shift and night duty allowances, at 15 and 7 percent of basic salaries, respectively (*Lusaka Times* 2013). A senior government official noted that these reforms were "a clear demonstration of the Government's desire to improve the welfare of its employees" (*Lusaka Times* 2013). These policies bore a similarity to UNIP-era reforms. Under Kaunda, the state intervened to ensure the upward social mobility of citizens via indigenization, employment policies, and food subsidies (Noyoo 2020).

The most significant social welfare reform under Sata was the expansion of a social cash transfer (SCT) scheme. The idea for SCTs, which involve monthly cash payments from the state to poor citizens, was popularized in the mid-2000s by international development agencies in response to extreme poverty and vulnerability (Hickey et al. 2019). The MMD government was opposed to implementing a national SCT scheme funded out of tax revenues on ideological grounds. Senior MMD leaders argued that cash transfers were handouts that would promote laziness and cause the poor to depend on the state for their livelihoods (Kabandula and Seekings 2016). The MMD's position on SCTs was unsurprising given that the party won power in 1991 promising to promote a free-market economy and prudent fiscal spending. Until 2011, cash transfers were pilot schemes implemented in less than a tenth of the country with primary funding from international agencies.

When Sata made his first presidential address to the National Assembly of Zambia in October 2011, he promised to implement a social protection policy that would address the needs of vulnerable groups such as the disabled and orphaned children by expanding the coverage of social protection programs (Siachiwena 2020). A National Social Protection Policy (NSPP) was published in 2014. It was accompanied by an expansion of the SCT scheme from a pilot funded by donors in five districts to a national program funded by state revenues. By the 2016 general election, the SCT program had expanded to reach 242,000 beneficiary households, a significant increase from 24,500 in 2011 (Siachiwena 2020). The PF's 2016

manifesto identified the expansion of SCTs as one of the party's most important accomplishments since 2011 (Patriotic Front 2016). The PF reported that 1.2 million Zambians had benefited from cash transfers, asserting that the scheme significantly reduced poverty among the most vulnerable households (Patriotic Front 2016, 4).

International donors had introduced SCTs in response to the adverse effects of neoliberal reforms on social sectors. In contrast, President Sata's administration embraced SCTs as a strategic tool to implement a more robust redistribution agenda than that of the MMD (Siachiwena 2020). In this sense, there was significant overlap between the neoliberal motivations for SCTs and Sata's interest in promoting a statist development agenda.

Parallels can also be drawn between the PF's expansion of the SCT scheme and UNIP's development agenda. At independence, Kaunda's government adopted the Public Welfare Assistance Scheme (PWAS)—a social protection program established by the colonial government in the 1950s to assist war veterans—and modified it to aid widows and other needy groups (Siachiwena 2020). The UNIP government also supported social welfare centers, which, like PWAS, were established by the colonial government to provide welfare services to citizens in villages and remote parts of the country (Siachiwena 2020). As Zambia's economy began to decline in the mid-1970s, funding to PWAS became erratic and the program was moribund by 1990.

The MMD government did little to implement social safety nets in the 1990s, exacerbating poverty, especially in rural areas. In response to the escalating poverty levels, the European Union supported a program to redesign PWAS in the late 1990s. Due to fiscal constraints, the redesigned PWAS was hardly funded and became a marginal program within the MMD's development agenda. The redesigned PWAS was then incorporated into the SCT scheme, which was designed in the early 2000s by another donor agency, the German Technical Cooperation. Therefore, expanding the SCT scheme primarily to villages and remote areas across the country amounted to a revival of PWAS and other UNIP-era social welfare services. The election of the PF provided the political support that was missing in previous administrations to promote cash transfers. In this way, the performative character of PF's social protection policies mirrored UNIP's welfarist ideas. The PF's support for social protection was also a clear departure from the MMD's aversion to handouts that did not align with ideals of prudent fiscal spending. Support for social assistance was also consistent with the PF's famous "more money in your pockets" campaign slogan, which emphasized redistribution and increased disposable incomes (Patriotic Front 2011).

Infrastructure development

The PF 2011 manifesto identified poor infrastructure as a significant constraint to national development. The Afrobarometer survey conducted in 2009 confirms that infrastructure development was one of the three most important problems that citizens believed the government needed to address. The PF argued that the MMD had made little progress in improving social and physical infrastructure because of a focus on fiscal prudence (Patriotic Front 2011). Physical infrastructure became a significant feature of public policy during Sata's presidency.

The most prominent infrastructure program was the Link 8000 project, which was launched in September 2012. It was a massive project to construct 8,000 km of road countrywide within five years. The project addressed the country's decrepit road infrastructure while promoting employment creation for low-skilled workers. In his presidential speech to officially open the National Assembly in 2013, Sata noted that the government would also implement a Pave Zambia 2000 Project to pave 2,000 km of dirt roads and public sidewalks across the country (*Lusaka Times* 2013). Further, between 2011 and 2014, Sata created a new province (Muchinga) and thirty-one new districts countrywide. The creation of districts was intended to be accompanied by projects to construct new schools, health institutions, roads, police stations, and related infrastructure.

The MMD government had also identified infrastructure as a significant constraint to development in its fifth and sixth national development plans that were published in 2006 and 2011, respectively. The PF maintained a focus on infrastructure when it published a revised sixth national development plan in 2013 to reflect its development priorities. The MMD's approach to infrastructure investment was more cautious, focusing on fiscal restraint and prioritizing debt sustainability. In contrast, the PF administration, benefiting from Zambia's 2005 completion of the HIPC Initiative and subsequent reclassification as an LMIC, seized the opportunity to access international financial markets through Eurobonds. Additionally, the PF capitalized on rising copper prices and secured increased loans and grants from China, enabling significant investments in infrastructure development.

Finance Minister Alexander Chikwanda raised Zambia's debt ceiling from 20 to 35 billion kwacha in 2013, expanding the government's borrowing capacity to fund infrastructure projects (Chikwanda 2012). In his memoirs, Vice President Guy Scott notes that Sata strongly believed in infrastructure as the primary vehicle for delivering development, driven by a desire to reverse "decades of decay" with urgency and determination (Scott 2019, 150–51). For Sata, large-scale infrastructure investment embodied the authority and responsibility of a strong state. This view aligned with early UNIP leadership, which also regarded physical infrastructure as essential to national development. His agenda aimed to recreate the conditions of an earlier development period widely perceived by Zambians as more socially and economically secure than the neoliberal reform years under the MMD.

Further research is needed to assess the actual outcomes of Sata's policies and whether his efforts to revive statism delivered the intended benefits. It is also important to critically examine the tension between pursuing a state-led development agenda funded by external borrowing and maintaining fiscal discipline. This tension is especially relevant in the case of Zambia, which exited the HIPC initiative in the 2000s only to return to Bretton Woods programs in the 2020s after once again accumulating unsustainable debt (Siachiwena and Seekings 2023).

Conclusion

This article contributes to debates on Africa's political economy over the past two decades, referred to here as the "poststructural adjustment era." It shows

that the performative nature of the PF's most salient policies under Sata reflected efforts to revive a statist development model rooted in the immediate postindependence period. Evidence from anthropological studies (see Ferguson 1992, 1999; Mususa 2021) and the 2009 Afrobarometer survey suggests that many Zambians believe life was better under UNIP when there was a strong state. This is supported by a commonly held view among older Zambians that life was better during the Kaunda era when the state controlled the productive sectors of the economy and provided social services.

As an opposition leader, Sata criticized the MMD's free market policies and reimagined an earlier period of development. His strong urban electoral performance in 2006 prompted the MMD to embrace some of his ideas, such as reforms to the mining tax regime. As president, he attempted to restore a statist development agenda that prevailed early in his political career. This was exemplified by his efforts to reestablish or nationalize state-owned enterprises, his approach to social welfare, and massive investments in infrastructure development. Zambia's graduation from HIPC in 2005 and to LMIC status in 2011 introduced the state to additional sources of funding. The PF also gained from favorable copper prices and access to Chinese soft financing.

Sata's presidency had a lot in common with that of Tanzania's John Magufuli, who has also been described as populist and elitist plebian⁴ (Paget 2020b). Like Sata, Magufuli—president of Tanzania from November 2015 until he died in office in March 2021—emphasized industrial development strategies focused on infrastructure development (Paget 2020a). He adopted a “restorationist developmental nationalism” that looked to a past order—“Nyerere's Tanzania”—as a basis for building a transformed future (Paget 2020a, 1240). Both leaders attempted to restore the statist development models that Kaunda and Nyerere had implemented in the postindependence era. In doing so, the leaders were tapping into a widespread sentiment that “life was better” in the past, the period after independence, and that they could restore that order. The cases of Sata and Magufuli suggest that African leaders described as populists may have broader visions of development than hitherto acknowledged.

Zambia's transition into the poststructural adjustment era heightened pressure on political leaders to adopt policies that directly address citizens' needs. Across Africa, democratically elected governments are increasingly held accountable by their electorates to respond to pressing economic challenges. In 2024 alone, cost-of-living protests erupted in Nigeria and Kenya, targeting leaders who had only recently come to power. That same year, long-standing ruling parties in Botswana and South Africa lost their parliamentary majorities for the first time, reflecting widespread frustration over inadequate basic service delivery. In September 2025, Malawi's president lost elections after only one term in power amidst an economic crisis. Afrobarometer survey data indicate that most South Africans expect their leaders to strengthen the regulation of strategic sectors such as mining to improve human development outcomes (Ndlovu 2024). While the literature on populism acknowledges issues such as poverty and inequality, it often underestimates the extent to which populist strategies are embedded in broader ideological frameworks and development agendas.

Building on the discussion of approaches to development, this article does not aim to evaluate whether Sata succeeded in restoring a statist development agenda. Rather, it demonstrates that the performative character of his policies aligned with principles of decisive state intervention and echoed elements of the UNIP era. The article highlights how Sata's politics and policy choices reveal broader tensions between neoliberal and statist development models in Africa's poststructural adjustment context.

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Notes

1. Data on Zambia's GNI per capita are available at the World Bank's data bank: <https://databank.worldbank.org/>
2. The results are reported as a percentage of those who either "agreed" (i.e., strongly agreed or agreed) with the statement presented, "agreed" with a second statement that contrasted the first one, "don't know" or "neither agree nor disagree" with either of the two statements. Figure 1 only reports responses to one of two themes for each statement that are relevant to the analysis in this article.
3. The international actor's category includes: (i) the IMF and World Bank, (ii) other international donors and NGOs, (iii) international businesses and investors, and (iv) the Economic Recovery Program. Responses omitted from the analysis are: (i) opposition parties and politicians, (ii) the Zambian business community, and (iii) the Zambian people. These responses accounted for 1.3, 0.3, and 6.7 percent respectively.
4. 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.

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