



**THE UNIVERSITY OF ZAMBIA**  
**INSTITUTE OF ECONOMIC AND SOCIAL RESEARCH (INESOR)**

**2015 ANNUAL REPORT**



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## Acronyms

ACC	-	Anti- Corruption Commission
ALRN	-	African Labour Research Network
CBU	-	Copperbelt University
CTPD	-	Center for Trade Policy and Development
DRGS	-	Directorate of Research and Graduate Studies
ECRDC	-	Elizabeth Colson Research and Documentation Centre
GDP	-	Gross Domestic Product
GRP	-	Governance Research Programme
FK/BEEP	-	Fredskorpset Business Exchange Programme
FISP	-	Farmer Input Support Programme
FNDP	-	Fifth National Development Plan
FRA	-	Food Reserve Agency
FSDP	-	Financial Sector Development Plan
HSS	-	School of Humanities and Social Securities
ICT	-	Information Communication Technologies
IO	-	Information Officer
INESOR	-	Institute of Economic and Social Research
MDGs	-	Millennium Development Goals
MDRI	-	Multilateral Debt Relief Initiative
MLSS	-	Ministry of Labour and Social Security
MMD	-	Movement for Multi- Party Development
MOFNP	-	Ministry of Finance and National Planning
MOTA	-	Ministry of Tourism and Arts
NCC	-	National Constitutional Commission
NCD	-	Non Communicable Diseases
NHSP	-	National Health Strategic Plan
NTNU	-	Norwegian University of Science and Technology
NWO WOTRO	-	Netherlands Scientific Organisation

PhD	-	Doctor of Philosophy
SILC	-	Savings and Internal Lending Communities
SNDP	-	Sixth National Development Plan
TB	-	Tuberculosis
UNICEF	-	United Nations International Children's Emergency Fund
USAID	-	United States Agency for International Development
WHO	-	World Health Organisation
UNZA	-	University of Zambia
ZOCS	-	Zambia Open Community Schools

## **1.0 Introduction**

### **1.1 Brief Description of the School/unit**

The Institute of Economic and Social Research (INESOR) is the Social Science research wing of the University of Zambia. Currently, INESOR is organized around six research programmes:

- Agricultural and Rural Development Research Programme (ADRP)
- Economic and Business Research Programme (EBRP)
- Governance Research Programme (GRP)
- Health Promotion Research Programme (HPRP)
- Socio-Cultural Research Programme (SCRP)
- Urban Development Research Programme (UDRP)

These programs are designed to encompass and promote interdisciplinary scholarly and development research in Zambia. The Institute has a strong multi-disciplinary team of 18 full-time Research Fellows with a minimum qualification of a Master's Degree and a team of 18 experienced support staff. The Director is the administrative and academic head of the Institute and is supported by a team of administrative staff.

INESOR is autonomous in its research operations and maintains its own accounts and is responsible for financing its daily operations. The Institute's core functions are research, teaching and supervision, training, consultancy, community and public service. The Institute provides research and related services to the government of Zambia, the private sector, International development agencies and a whole range of bilateral and multilateral development agencies working in Zambia and Africa and the rest of the World. In terms of research infrastructure, INESOR has a fully functional Documentation and Information Centre called the Elizabeth Colson Research and Documentation Centre (ECRDC), an Information Office (IO) and Training Centre which is fully serviced with Wi-Fi connectivity.

## **1.2 Highlights for the year**

The Institute was involved in a number of activities during the year 2015. Some of these include:

- 1.0.1 A number of new research projects were initiated such as the Makhalidwe Atu Project, Evaluation of the Malaria Project, and Corruption in the construction sector among others.
- 1.0.2 We hosted an Exchange Participant, Luka Njau on the Fredskorpset Business Exchange Programme from Moshi University, Malawi who conducted a research Innovativeness in Diary Agricultural Cooperatives in Central Provinces.
- 1.0.3 Two (2) Research Affiliates from Norway and United States of America were hosted in 2015. The former, Jan Ketil Simonsen is an Associate Professor in Anthropology at Norwegian University of Science and Technology (NTNU) and conducted a research on Uwinga Marriage Rites among the Mambwe Who settled in John Laing while the latter Valerie Stull, a PhD student and Fulbright researcher from the University of Wisconsin – USA was researching on edible insects and the potential to farm them as a sustainable year round protein source.
- 1.0.4 We look forward to initiating new research projects and will also continue with ongoing research projects such as the Child Health Impact Study (chTIS), Acceleration of Mother to Child Health (H4), among others.

## **2.0 School /unit Governance**

### **2.1 Structure (Operation Framework)**

The Institute of Economic and Social Research is headed by the Director who is elected by academic members of staff for a three year term of office and may serve for two terms. The Director runs the Institute with the help of the Assistant Director who assists the Director with administrative planning, management and coordination of research projects in the Institute. Research Programme Coordinators on the other hand are responsible for planning, managing and coordinating research projects of the Institute's six designated research projects on behalf of management.

### **2.2 Departments and their functions**

The Institute conducts its activities through its Six Research Programmes. The six Research Programmes are complimented by the Financing and Administration Units. The INESOR Administrative structure is lean and simple, marked by a participatory and transparent management style, which allows for easy coordination of research activities and smooth flow of information.

In terms of organization, the Administration Office is made up of the Office of the Assistant Registrar, the Senior Administrative Office, the Purchasing Office, the Stores Office, Information Technology Office, Finance office, Information Office and Documentation Centre. The role of Administration Office is to ensure that the operations of the Institute run smoothly.

The Institute works through a multidisciplinary research team of six research programmes namely Agriculture and Rural Development, Economic and Business Research, Governance Research Programme, Health Promotions Research, Social Cultural Research Programme and Urban Development Research Programme. These programmes differ in terms of focus as outlined below:

### **2.2.1 Agriculture and Rural Development Research Programme**

The growth of the agricultural sector has always been considered important for attainment of Zambia's long term growth vision. For instance, the Fifth National Development Plan (FNDP) positioned the agricultural sector as one of the driving engines for the anticipated economic growth required to reduce poverty; while the Sixth National Development Plan (SNDP) identifies the sector as a priority sector in achieving sustainable economic growth and poverty reduction. This is because the country is relatively well-endowed with natural resources such as land, water and fertile soils that support agricultural activities. In addition, the majority of the country's population is rural-based, while over 80 percent of the rural population depends on agricultural-related activities for their livelihood.

Despite the immense potential, the agricultural sector's contribution to Gross Domestic Product (GDP) has averaged 18 percent since the 1990s. Real growth rates in the sub-sectors have significantly fluctuated in the past four decades mainly due to high dependence on rain-fed production, low investment in the sector and failure to strategically position the sector in line with its comparative advantage. Consequently, smallholder farmers are faced with challenges of low production and productivity that are exacerbated by climate change (manifesting in the form of prolonged dry periods and increased temperatures during the farming seasons); inadequate extension services; high cost/lack of financing; dysfunctional commodity value chains; inadequate infrastructure; livestock diseases; overfishing and poorly functional agricultural markets. Furthermore the competitiveness of the sector has been adversely affected by poor road network, inadequate storage and limited access to electricity. As a result, the prevalence of poverty among those depending on agriculture is highest (over 78 percent) while food insecurity also has remained unacceptably high (about 50%).

#### **Priority Areas**

In line with the identified challenges in the sector, the research focus for the ARDP will concentrate on the following research areas that are of direct benefit to the sector and small-scale farmers in particular:

- i. Agricultural Commodity Value Chains and Smallholder Market Access
- ii. Poverty and Agricultural Policy

- iii. The role of private/public partnerships in enhancing agricultural productivity
- iv. Rural finance and rural livelihoods
- v. Drought power and agricultural productivity
- vi. Agricultural diversification
- vii. Capacity building of individuals and institutions in the sector

### **2.2.2 Economic and Business Research Programme**

Zambia has registered real growth of the gross domestic product of above 5 percent per annum over the last decade with annual inflation dipping to single digit figures. Lending rates have stood at over 20 percent on average while the exchange rate has depreciated against a backdrop of strengthening external sector position, thereby putting pressure for real appreciation of the rate and potential for the economic development of natural resources and a decline in the manufacturing sector (or agriculture) commonly referred to as Dutch disease problem. According to the 2012 Economic Report, economic growth is expected to be higher for the coming years, propelled by the agriculture, mining, manufacturing and construction sectors. Macroeconomic stability is also expected to be maintained, having received substantial debt relief from the Multilateral Debt Relief Initiative (MDRI). The authorities aim to maintain debt sustainability. Financial intermediation is expected to increase, especially with the implementation of Financial Sector Development Plan (FSDP), improved public expenditure management and financial accountability to enhance public services delivery.

Despite these positive developments, the major challenge facing the country is wealth creation, poverty reduction for the Zambian people and formal sector employment creation. Although Zambia has conducted six country wide surveys on living conditions of the people, the results are not comparable across the surveys due to different methodological procedures used. The 2006 survey put aggregate poverty levels for the country at 64 percent with a spread of 80 percent for rural and 34 percent for urban areas. Formal sector employment was recorded at 495,784 in 2005, representing about 10 percent of the labour force.

The EBRP tackles many of these key economic issues facing Zambia in respect of economic development and macroeconomic policy analysis. Specifically, the programme focuses on pro-

poor policies; macroeconomic analysis, labour and employment; entrepreneurship and private sector development; linkages between foreign and small and medium scale enterprises; and competitiveness of different sectors of the economy. The programme also undertakes capacity building for policy and programming through short courses in monitoring and evaluation, research methodology and data analysis, and public policy analysis.

### **Priority Areas**

In the next five years the EBRP will primarily focus on the following areas for research:

- i. Macroeconomic policy interventions
- ii. Business and financial market environment
- iii. Employment and job creation patterns
- iv. Human Development Indicators
- v. Improved policy and programme design, implementation and review

### **2.2.3 Governance Research Programme**

The Governance Research Programme (GRP) was established in the wake of the transition from One-Party System to Multiparty System of government and the democratisation process after 1991. As part of the transition, the new Movement for Multiparty Politics Government developed a policy on good governance and undertook a number of policy initiatives and activities in the areas of Constitutionalism, Human Rights, Transparency and Accountability as well as the administration of Justice and Democratisation. The transition also saw the introduction of multi-party elections which in turn necessitated a new electoral policy and institutional reforms as well as citizen participation and representation.

The research programme partly took its mandate and was influenced by the Fifth National Development Plan (FNDP), which articulated a government vision of the in the Governance Sector of totally adhering to the principles of good governance by year 2030. The Governance Research Program has sought to enhance and monitor this process and effort in the struggle to realise this vision. One of the key areas of concern is the Constitution Making Process which Zambia has been undertaking for nearly a decade. After the Mung'omba Commission that was

established to seek stakeholder and citizen's views on the makeup and form of a new post one-party state constitution, the National Constitutional Conference (NCC) was finally established through the National Constitutional Conference Act No. 19 of 2007 to develop and adopt a new Zambian Constitution. The NCC had its first sitting on 19<sup>th</sup> December 2007. The establishment of the NCC sparked off considerable controversy among stakeholders. (The key issues sparking the controversy centred around issues that needed to be reflected in the constitution, given the presidential and ruling party's perceived hesitations on some of these issues). There were concerns in some circles that key elements of the provisions of the Mung'omba Draft Constitution were in the process of being manipulated or marginalized such as the referendum as the mode of adoption of the constitution.

Another issue of concern was representation in the NCC which some stakeholders felt lacked full transparency. Some of the stakeholders did thus, boycott participation in the NCC. After spending over 200 million Kwacha (about US\$40 million), the NCC draft constitution failed to pass in parliament in 2008 as it could not get a two thirds majority. The opposition rejected it for failing to incorporate key elements such as the running mate, 50 plus 1 and the Human Rights Charter, among others. The circumstances surrounding the failure of this constitutional bill still require detailed study and exploration.

Zambia was expected to hold the 2011 Tripartite Elections in 2011 under a new Constitution but this failed to happen and the country went to the polls under the old constitution based on the first past the post. There were considerable misgivings about the intentions of the government and even its sincerity in holding free and fair democratic elections was questioned. The Movement for Multiparty Democracy (MMD) government lost the elections in 2011 and the new government led by the Patriotic Front of Michael Sata has embarked on a new constitution making process. Using the drafts of the previous process, a Constitutional Review Committee of 20 people was set up in 2012. It began consultations with stakeholders and groups of citizens country-wide without a clear road map and budget. Within 10 months of its operations it had gobbled close to 200 million Kwacha (equivalent to MMD's one year long NCC). The draft is in the process of presentation to the president and it remains unclear what process will unfold after that. Thus, The Governance Research Programme has a monumental task of not only following

up on the constitutional making process, but also in disentangling the parameters in order to make understandable why the process has historically been unwieldy and generally unsatisfactory.

### **Priority Areas**

In the next five years the GRP will primarily focus on the following areas for research:

- i. Assess the role of women in the liberation struggle in Southern Africa
- ii. Constitution making in Zambia
- iii. Effectiveness and efficiency of Governance Oversight Institutions
- iv. Elections processes and management
- v. Decentralisation policy and implementation process
- vi. Functions and authority of traditional leadership under the dual legal system
- vii. Opinion polls on topical issues in Governance, Democracy and National Development

#### **2.2.4 Health Promotion Research Programme**

Since 1992, the Government of the Republic of Zambia has been implementing major health reforms. The main purpose of the health reforms has been to increase efficiency and effectiveness in the provision of health services with the chief outcome of interest being the improvement of the health status of Zambians. During the course of implementing the health reforms, the Ministry of Health has implemented four sector strategic plans covering the periods 1995-1998; 1998-2000; 2001-2005 and 2006-2010. Like the previous strategic plan (2006-2010), the current National Health Strategic Plan (2011-2015) is aligned to the overall National Policy Framework (the Vision 2030) as well as the Sixth National Development Plan (2011-2015).

The Vision of the reforms has been to: *“...provide the people of Zambia with equity of access to cost-effective, quality healthcare as close to the family as possible....”* The health reforms, however, have been characterized by a number of challenges including (i) a huge disease burden due to both communicable and non-communicable diseases; (ii) insufficient and declining domestic financial resources; (ii) donor dependency; (iii) Human Resources for Health crisis; and (iv) a poor governance record. The National Health Strategic Plan (NHSP) 2011-2015 outlines an ambitious course to streamline the process of health service delivery through prioritization

and the implementation of high impact interventions. This is as a result of inadequate resources and capacities to deliver all the interventions.

In the recent past the Zambian government has gone further to shift Maternal and Child health to the Ministry of Community Development Mother and Child Health in line with the vision of the health reforms. However, this is not the first attempt by the government; earlier the decentralization process implemented in the health sector between 1992 and 2006 was premised on providing Zambians with equity of access to cost-effective, quality health care as close to the family as possible” (MoH, 1992). Its aim was to decentralize health service delivery, based on the primary health care approach (MoH, 1992). Community structures were established, including Health Centre) in 1993 (Danish Ministry of Foreign Affairs 1994), which increased the disbursement of funds to districts, enabling them to fund health services that addressed district priorities (MoH, 2009).

The NHSP of 2011-2015 focuses on achieving the national health priorities, which will include: (i) improving resource mobilization and allocation; (ii) resolving the Human Resources for Health crisis; (iii) Infrastructure Development; (iv) Essential Drugs and medical Supplies; and (v) addressing national public health priorities including the MDGs. Despite this ambition, it is important to recognize that the NHSP 2011-2015 is being implemented at a time characterized by significant changes and challenges such as donor fatigue.

The health promotion programme seeks to address some of these challenges being faced in the health sector by undertaking research that will help strengthen health systems and policy (encouraging the uptake of health research and evidence based policy making to specifically deliver and manage policy in the health sector); research that will contribute towards the acceleration of the health related MGDs; research that will help to strengthen linkages between the health facilities and the community; Seek to conduct research activities on environmental issues, Non-Communicable Diseases (NCDs), Communicable diseases (Malaria, TB, HIV/AIDS) and behavioural sciences; and conduct research that will provide insights on how the Zambian Government can improve Health Care Financing, particularly budgetary allocation and execution.

## **Priority Areas**

In the next five years the HPRP will primarily focus on the following areas for research:

- i. Child and maternal health.
- ii. Infectious diseases of major public health significance in Zambia, such a HIV and AIDS, malaria and TB
- iii. Non communicable diseases such as cancer
- iv. Health delivery systems
- v. Behaviours change communication.
- vi. Gender and health

### **2.2.5 Socio-cultural Research Programme**

Zambia's population was reported to be at 13.3 million in 2010 and is projected to increase to 15.5 million by 2015, based on the annual growth rate of 2.4 percent. At this growth rate, the population is expected to double by 2030. A majority (46.0%) of the population is under the age of 15 and is highly dependent.

A highly dependent population poses a great socio-economic burden on the family and the nation as a whole. Mitigation of this burden will largely depend on measures put in place to promote sustainable development which puts into consideration social and cultural factors. Social and cultural factors cut across all aspects of national development including economics, health, communication, education, gender, child development, etc. The 5th National Development Plan defines culture specifically as — the whole complex of distinctive spiritual, material, intellectual and emotional features that characterize a social group. It includes not only the arts and letters, but also modes of life, the fundamental rights of the human being, value systems and traditional beliefs.

Social and cultural phenomena such as: gender based violence, incest, ethnocentrism; tribalism; organized crime, anomy, street children as well as the impact of Information and Communication Technologies have generally not been given enough attention in shaping national development

policies. To address this gap the Socio-cultural Research Programme intends to generate evidence based information through research to guide national development policies.

### **Priority Areas**

During the planning period 2013 to 2017, the Socio-cultural Research Programme, Mandated by the University of Zambia Senate and guided by the Sixth National Development Plan will carry out short and long term studies focusing on the following areas:

- i. Communication, Information Communication Technologies for development, in response to various development processes currently under way;
- ii. Utilization of indigenous knowledge, with respect to food processing, preservation and storage, in response to the nation's current efforts aimed at food sufficiency and food security;
- iii. Contributing to the enhancement and/or promotion of the tourist industry with regard to, in particular, tourism promotion and marketing, tourism product development, tourism sector capacity building and the promotion of cultural and creative industries;
- iv. Contributing to the evolution of a comprehensive language policy and practice for Zambia;
- v. Contributing to the preservation and promotion of Zambia's intangible socio-cultural heritage with special reference to changing family patterns as well as social and cultural traditions and trends in general; and,
- vi. Analysis of rights and equity in respect of minority, marginalised and vulnerable groups (children, women, disabled, etc).

### **2.2.6 Urban Development Research Programme**

The Urban Development Research Program (UDRP) focuses on urban development issues and challenges. The main areas of focus are: Urban population dynamics and migration; urban livelihoods and poverty; Urban governance and decentralization; Access to land; and urban infrastructure with particular focus on urban planning; housing; water supply and sanitation, drainage and flooding, roads and transport services; education and health. It is also concerned with issues of local economic development and public health.

The Zambian urban scenario is characterized by rapid urban population growth with inadequate essential infrastructure and services, and high levels of unemployment and high levels of poverty. To address this situation calls for concerted research effort and reform of urban governance, planning and management systems. The research efforts are however, hampered by inadequate funding and human resources capacity. Research in the areas of urban development will generate questions and identify gaps that will require action. The urban governance, planning and management are perhaps the biggest areas that require attention. The various studies have shown that there are serious deficits in housing, water and sanitation against rapid population growth and increasing urban poverty. The sanitation situation is also worrying, because only 33% of urban households having access to safe sanitation. In the Peri-Urban areas, where 50 to 70 percent of the urban population lives, only 44 percent of the population have access to safe water supply, and less than 20 percent have access to satisfactory sanitation facilities.

A good living environment is an important pre-requisite to national economic development and human well being, therefore good housing is a basic social need and human right after food and clothing. Inadequacy in the provision of housing, has negative impacts on welfare and dignity, the environment, and economic performance. Zambia has had critical shortages of housing since independence, worsened by the ever increasing rural-urban migration. This has been the result of the historically unequal / biased pattern of development between rural and urban areas. The situation was compounded by the lack of a comprehensive housing policy to guide the provision of housing up until 1996. Access to land for development is another challenge to urban development this is mainly due to the inappropriate land tenure system characterised by centralised procedures and administrative hurdles.

### **Priority Areas**

Given the above situational analysis in the context of urban development, the following are the priority areas identified for the UDRP during the 2013 -2017 period:

- i. Migration and Urban Population Dynamics, Policy and Planning
- ii. Urbanisation, Planning and Housing in Zambia

- iii. Health and Environmental management and considerations
- iv. Water and Sanitation
- v. Urban Poverty, Governance and Decentralization

In all the above focus areas, cross-cutting issues of HIV/AIDS, Climate Change and Gender is mainstreamed.

### **2.3 Committees and their functions**

INESOR works through a various committees, some of which are permanent and others Adhoc. The following are some of the committees:

#### **2.3.1 INESOR Research Advisory Committee**

The Committee is an advisory body of the Institute of Economic and Social Research on research activities. It gives advice and recommendations to INESOR research programs on ethical and potential research areas.

#### **2.3.2 INESOR Board of Research Programmes**

The Board is answerable to the University of Zambia Senate, the highest Academic decision-making body of the University. The Board of Research Programmes performs the following functions:

- (a) Consider and co-ordinate research proposals submitted to it from INESOR academic staff and researchers affiliated to INESOR;
- (b) Refer accepted research proposals to the Senate Research and Grants Committee for approval;
- (c) Coordinate with other Academic units of the University of Zambia in order to avoid overlap in research activities;
- (d) Consider ways of responding to the concerns referred to it by the Institute's Research Advisory Committee;
- (e) Consider applications by scholars for affiliation to the Institute and advise the appointments Committee of Council on such applications;

- (f) Advise the Senate on matters of policy related to the short and long term development of the Institute with particular reference to its research programmes;
- (g) Consider such matters relating to the planning and administration of research at the Institute as shall be referred to it by the Senate or the Vice-Chancellor.

### **2.3.3 INESOR Management Committee**

The INESOR Management Committee is responsible for day to day administrative work, planning, decision making in relation to staff welfare.

### **2.3.4 INESOR Consultancy Committee**

This committee is responsible for planning and offering consultancy services in line with the University of Zambia Consultancy regulations and to act as window for clients to the services and expertise available in the institute.

### **2.3.5 INESOR Finance Committee**

The INESOR Finance Committee is responsible for considering all financial issues including budgeting.

### **2.3.6 INESOR Administrative Committee**

Administrative Committee meets every time and looks at every day running of the Institute.

### **2.3.7 INESOR Human Resources Establishment, Appointment and Promotion Committee Academic**

The Human Resources Establishment, Appointment and Promotion committee is responsible for considering applications for promotion, renewal of employment contracts and confirmation of appointment of all Academic members of staff.

### **2.3.8 INESOR HR establishment, Appointment and Promotion Committee (Non Academic)**

Human Resources Establishment, Appointment and Promotion committee is responsible for considering applications for promotion, renewal of employment contracts and confirmation of appointment of all the two categories of staff; middle management and unionized staff.

### **2.3.9 INESOR Adhoc Committee**

The Institute also works through a number of Adhoc Committees such as Social Welfare Committee, ICT Computer Committee and Restoration Committee.

## **2.4 Policies and procedures/work manuals**

In order to enhance INESOR processes, the Institute reviewed some policies and work procedure in line with what is acceptable at main campus. The following are some of the policies and procedure that were reviewed:

### **2.4.1 Procedures and conditions for hire of INESOR Motor Vehicles**

For a long time, there has not been any laid down procedure or conditions concerning the hiring of INESOR vehicles. In order to avoid subjectivity and misinterpretation, conditions and guideline for hire of INESOR vehicles were devised.

### **2.4.2 Institutionalizing the staff performance appraisal system**

The Institute began the process of institutionalizing the newly developed UNZA performance appraisal system. This newly developed system will improve contribute to improving staff performance by holding staff accountable for the time at work. It will also serve as a guide for to staff in terms of what is expected of them. Currently, the process is being finalized and it is expected to begin rolling out this process by June 2016.

### **2.4.3 Reviving INESOR Committees**

Management embarked on a process of reviving INESOR Committees in an effort to improve the performance of the Institute. The committees in question include the INESOR Advisory Committee, INESOR Board of Research Committee and INESOR Finance Committee, Consultancy Committee, and INESOR Human Resource Committee, among others. This is because the committees have not been very active in the recent past. Hence, the need to review their membership and terms of reference as a way of reviewing the said committees. The INESOR Board of Research Committee met in December 2015 to draw up a plan of action for the future.

### **3.0 School/ Unit Management**

#### **3.1 Financial Overview**

Below is the statement of comprehensive income as at 31 December, 2015.

<b>STATEMENT OF COMPREHENSIVE INCOME</b>						
<b>Name</b>	<b>Oct- Dec 2015</b>			<b>Year to-date</b>		
	<b>Actual</b>	<b>Budget</b>	<b>Variance</b>	<b>Actual</b>	<b>Budget</b>	<b>Variance</b>
	<b>K'000</b>	<b>K'000</b>	<b>K'000</b>	<b>K'000</b>	<b>K'000</b>	<b>K'000</b>
Grant Recurrent Monthly	-	-	-	-	-	-
Other student fees				16,891	-	(16,891)
Project Management Fees	243,373	405,859	162,486	1,055,859	1,623,434	567,576
Other Income	75,600	203,950	128,350	185,457	815,800	630,343
<b>Total income</b>	<b>318,973</b>	<b>609,809</b>	<b>290,836</b>	<b>1,258,206</b>	<b>2,439,234</b>	<b>1,181,028</b>
<b>Administration expenses</b>						
Academic staff costs	1,232,512	2,656,315	1,423,803	5,141,113	10,625,258	5,484,146
Non-academic Staff costs	512,486	964,872	452,386	2,093,023	3,859,489	1,766,466
Infrastructure & maintenance	56,427	115,938	59,510	188,975	463,750	274,775
Depreciation	40,950	82,833	41,883	167,778	331,332	163,554
Admin. Support Act.	131,691	174,325	42,635	584,728	697,301	112,573
Councilors fees					-	
Finance Charges					-	
<b>Total administration expenses</b>	<b>1,974,066</b>	<b>3,994,283</b>	<b>2,020,217</b>	<b>8,175,617</b>	<b>15,977,131</b>	<b>7,801,514</b>
<b>( Deficit )</b>	<b>(1,655,093)</b>	<b>(3,384,474)</b>	<b>(1,729,381)</b>	<b>(6,917,411)</b>	<b>(13,537,896)</b>	<b>(6,620,485)</b>
<b>Other Comprehensive Income</b>						
Dividends					-	
Revaluation					-	
Exchange Gain/(Loss)					-	
<b>Total other comprehensive income</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>( Deficit )</b>	<b>(1,655,093)</b>	<b>(3,384,474)</b>	<b>(1,729,381)</b>	<b>(6,917,411)</b>	<b>(13,537,896)</b>	<b>(6,620,485)</b>

## 3.2 Human Resource

### 3.2.1 Staff Strength (Establishment)

As at December 31, 2015, INESOR had a total of 36 members of staff out of an establishment of 45. Of the existing members of staff, 18 were academic staff, while 18 were support staff with a shortfall of 1. Academic members of staff included 1 Research Professor, 1 Associate Professor, 2 Senior Research Fellows and 14 Research Fellows.

**Table 1: Staffing Levels**

<b>Research Program/Section</b>	<b>Approved</b>	<b>Existing as of December, 2013</b>	<b>Shortfall/Surplus</b>
Directorate	2	2	0
Agriculture and Rural Development	5	2	-3
Economic and Business	5	4	-1
Governance	5	3	-2
Health Promotions	5	3	-2
Socio-cultural	5	3	-2
Urban Development	5	3	-2
Administration	19	18	-1
<b>Total</b>	<b>51</b>	<b>36</b>	<b>-13</b>

### 3.2.2 Staff Training and Development

In its pursuit to enhance quality service delivery and staff development, the Institute continued with human resource capacity building. During the period under review, three members of staff were pursuing their respective PhD programmes as shown in the table below:

**Table 2: Staff Development Programme - INESOR**

<b>Name</b>	<b>Field of Study Institution</b>	<b>Institution</b>	<b>Expected Year of Completion</b>
Joseph Simbaya	PhD Programme in Medical Anthropology	University of Amsterdam in the Netherlands	August, 2016
Grayson Koyi	PhD in Business Administration	Copper belt University (CBU)	2016
Richard Bwalya	PhD Programme under Commonwealth Split Programme	Reading University in the USA	September, 2016

**3.2.3 Staff promotions**

During the period under review, the following promotions took place:

- i. Five Research Fellows were appointed as Coordinators of their respective research Programmes. These are Richard Bwalya for Agriculture and Rural Development, Grayson Koyi for Economic and Business Research Programme, Nalukui Milapo for Governance Research Programme, Chishimba Mulambia for Health Promotions Research, Munukayumbwa Munyima for Socio-Cultural Research Programme and Urban Development Research Programmes.
- ii. Chishimba Mulambia, Munukayumbwa Munyima and Nalukui Milapo were promoted from Research Fellow I to Research Fellow II.

**3.2.4 Staff Capacity Building**

The Institute held a training workshop between 26<sup>th</sup> and 30<sup>th</sup> October, 2015 at Mika Exotic Hotel on Grant and Proposal writing and team building. A total of 23 participants attended the training workshop. The following were the objectives of the workshop:

- To enhance capacity of academic members of staff in the area of academic writing and publishing as a means of promoting INESOR as a regional think tank and to influence policy
- To build/ strengthen capacity of academic members of staff in the area of grant/ proposal writing as a means of raising funds;
- To stimulate change of mind set as a means to enhance staff outputs and quality assurance; and
- To enhance team work amongst all members of staff.

### **3.3 ICTs**

#### **3.3.1 Use of ICT**

The Institute experienced intermittent internet after the fibre optic cable bringing internet to INESOR was cut by one of the car wash dealers trading along Munali Road. This being the case, we had to rely on radio signals which were unreliable. After a number of months of not having internet connectivity occasioned by a fibre optic cable which was cut by one of the car wash dealers, the Institute procured and installed a new fibre optic cable valued at to address the problem. Further, internet access points were installed at the Training Centre and House Number One (1) so as to increase the access to wireless internet.

### **3.4 Library and Information Services**

The following are the activities that the Elizabeth Colson Research and Documentation Centre during the period under discussion:

- Six (6) students from UNZA studying for their Library and Information Studies Degree and three (3) from the Evelyn Hone College studying for their Diploma in the same field were hosted at the Documentation Centre as partial fulfilment of their study programme.
- The Institute was part of the various schools and units that exhibited at the 2015 International Trade Fair where UNZA scooped first prize in the category of Education service providers and 2015 Agricultural and Commercial Show at which UNZA came second in the commercial category.

- In terms of user statistics, the Documentation Centre's patronage increased from 6 - 8 visitors per day in 2014 to 9 -10 visitors per day in 2015.
- The Library also participated in the 2015 orientation of UNZA first year students meant to familiarize them to the various activities of the university.
- Routine works of the library such as shelving and shelf reading, cataloguing and classification, etc were done.
- A total of 350 manuscripts and articles were added to the collection thereby increasing the variety of information materials available for use by our clients.

### **3.5 Strategic Partnership**

Promoting partnerships is one of the strategic objectives of the UNZA current Strategic Plan (UNZA, 2013-2017). Guided by this objective, INESOR collaborates with various national, regional and global institutions. The partnerships serve different purposes, technical, financial and knowledge base sharing and building.

The Institute acknowledges the need for concerted efforts in addressing some of the challenges that society continues to grapple with. In this vein, the Institute continues to identify institutions that it can create synergies with. Currently, the Institute has maintaining the following partnership:

#### **3.5.1 FK/BEEP**

On a different note, the Institute's business exchange partnership under the Fredskorpset/Business Experience Exchange Programme (FK/BEEP) came to an end after having being in existence for close to 10 years.

FK/BEEP was a collaborative research initiative of Rural Producer Organizations (RPOs) and Research institutions in four countries of Tanzania, Uganda, Malawi and Zambia. The aim of the BEEP was to share and exchange business experiences between RPOs. The programme was supported by research institutions by conducting research using the formative process in order to support RPOs develop small-scale agricultural activities within national and international economic frameworks.

Under this programme, the Institute through its Agricultural and Rural Development Programme, hosted scholars from regional Universities (specifically Malawi's University of Malawi - Bunda College of Agriculture; Uganda's Makerere University and Tanzania's Moshi University College of Business Studies) and also sent Zambian scholars to the same institutions.

The Institute also benefitted from exchange of research and cultural ideas and experiences as well as skills transfer.

INESOR has also continued collaborating with a number of other international institutions in the areas of capacity development and research Collaborative research has also been conducted with various regions in Africa and beyond. Some of the institutions that INESOR has partnered with include:

### **3.5.2 Kyoto University**

The Urban Development Research Programme (UDRP) is also managing an on-going academic exchange and research cooperation between INESOR and Kyoto University of Japan which is expected to run up to 2016. This cooperation is funded by the Japanese Government. The overall objective of this programme is to foster academic cooperation and exchange between INESOR, Graduate School of Asia and African Studies (ASAFAS) and Centre for African Area Studies (CAAS) of Kyoto University. Under these arrangements, there has been exchange of scientific materials, publications and information; exchange of research members; and joint research and research meetings/symposia.

### **3.5.3 Ministry of Finance and National Planning**

Under this partnership, INESOR through its Capacity Building for Policy and Programming Project (POLYGRAM) coordinated by the Economic and Business Research Programme (EBRP), has been collaborating with the Ministry in order to build capacities of professionals by offering short training courses in various fields. The purpose of this partnership is to bridge the gap between industry and academia by developing an integrated approach to ensure that policy makers and industry expectations are met without any compromise on the academic aspirations

of the Institute. These trainings are aimed at raising the capacities of Researchers, Policy Makers and Program Managers to engage more effectively and achieve evidence based policy and program decision-making.

As a result of this engagement, the Institute has been recognized as a National Centre for Capacity Development in Monitoring and Evaluation for the Government of Zambia.

#### **4.0 Academic Matters**

##### **a) Teaching and learning**

In addition to undertaking research, INESOR staff also participated in teaching, supervision and examination of students in various departments across the university as required by central administration. Some of the courses that were taught include:

- Forced Migration (SS911)
- Gender Studies (GDS 5312)
- Veterinary Public Health (VMD 6800)
- Environmental Microbiology (BIO 4321)
- Reproductive Health (DE 915)
- Gender and Health (GDS (512)
- Urban Sociology (SC310)
- Statistics: Techniques and Methodology for Economics (ECN 2331)
- Micro Economics Theory for Policy (EPM 5111)
- Public Sector Economics (EPM 5155)
- Zambian Cultures and Ceremonies (ZCC 2000)
- Strategic Communication for Health and Development (ZCS 9070)
- Research Methodology in Development Studies (DEV 5000)

Academic members of staff at the Institute were also actively involved in the supervision of local and International students at both graduate and post graduate levels. Academic staff involved in supervision of students include:

- Dr. Mutumba Bull supervised a 4th year student from the History Department at UNZA. Research Topic: Mothers of the Liberation Struggle.
- Dr. Mutumba Bull supervised a PhD student. PhD Thesis- Welfare State and Nation Building: Social cash Transfer (Pilot) Program in Zambia, Free University of Berlin.
- Dr. Mutumba Bull supervised Masters Student. MSC in International Relations: The Puzzle of State Sovereignty – Discourses and Contestations. Zambia’s Territorial Integrity in Question. Norwegian University of Life Sciences.
- Dr. Choolwe Beyani supervised four (4) Masters Students in the Social Development Studies Department in the School of Humanities and Social Sciences (HSS) at UNZA.
- Mr. Mukata Wamulume supervised a Fredskorpset/Business Experience Exchange Program (FK/BEEP) Exchange Program participant from Moshi University in Tanzania.
- Dr. Sydney Malama supervised two Masters Students from the Veterinary and Medicine Schools and a PhD student in the School of Medicine.
- Ms. Gertrude Ngenda supervised a Master of Science student from the Moi University.

b) Research and Innovations

In line with its mission, vision, values and goals, the Institute conducted the following research projects, in collaboration with local and international partners:



**Table 3: Research Projects with Local and International Partners**

Title of Research Project	Description of Project	Partner/ Funder	Start and Finish Date
Survey of farmers' perceptions about Farmer Input Support Programme (FISP) and Food Reserve Agency (FRA) and their voting preferences in the January 20 Election.	<p>The main purpose of this survey was to establish:</p> <ul style="list-style-type: none"> <li>▪ Farmers 'perceptions about the effectiveness of FRA and FISP in providing the services for which they were established.</li> <li>▪ Whether farmers would want to see changes to the FRA and FISP, and the specific changes, if any, they would want to see.</li> <li>▪ Whether the campaign promises by politicians (individually as candidates or as political parties) on reforming FRA and FISP do actually influence the farmer's voting preferences.</li> </ul>	Centre for Trade Policy and Development (CTPD)	December 2014-May 2015
Mineral Sector Legislation, Fiscal Regime and Worker' Voice	To analyse Zambia's mining sector legal framework and fiscal regime to understand how it is promoting or impending beneficiation of the natural resource (i.e. copper) for Zambia's development.	African Labour Research Network (ALRN)	December 2015-March 2016
National Labour Market and Employment Policy Review	This project reviews the existing National Labour and Employment Policy.	National Economic Advisory Council (NEAC)	June 2014-September 2015

Trade Union Effectiveness in Meeting Workers' Expectations in the Public Sector in Zambia	The main purpose of the study was to contribute to existing knowledge about the effectiveness of trade unions in meeting workers' expectations in Zambia.	UNZA/INESOR – PhD Research	August 2013- August 2016
Sustainability through Economic Strengthening Prevention and Support for Orphans and Vulnerable Children (STEPS OVC)	This purpose of this study was to establish HIV/AIDS knowledge, attitudes, care and support, provide baseline information and to assess programme impact at individual, household and community levels.	Futures Group, World Vision	June 2012-January 2015
Impact Evaluation of Savings and Internal Lending Communities(SILC) on Child and Household Well Being	The aim of this study was to assess the impact of SILC, a community savings model, on participants, households and children overtime and to document the factors contributing to implementation scale up success.	Futures Group, United States Agency for International Development (USAID)	2011-2014
Executive Opinion Survey	The Executive Opinion Survey is a major component of the Global Competitiveness Report produced by the World Economic Forum. The globally conducted Executive Opinion Study presents an annual measure of a nation's economic environment and its ability to achieve sustained growth.	World Economic Forum	January- June 2015

Management quality, productivity and profitability in Zambian Manufacturing firms.	The purpose was to measure relationship between quality management practices productivity and profitability in Zambian manufacturing.	International Growth Centre/London School of Economics and Political Science	July 2015-June 2016
Revised Sixth National Development Plan (SNDP) Annual Progress Report	This was an assessment of the progress made with regard to the implementation of the Sixth National Development Plan (SNDP).	Ministry of Finance and National Planning (MOFNP)	April - June 2015
Evaluation of Malawi Congress of Trade Unions Organisations Development Programmes	This was an evaluation of Organisation development Programme for Labour for the Malawi Congress of Trade Unions.	Labour Organisation of Norway	April - June 2015
ODA and PPP in Zambia	The purpose of the study was three- fold: 1. To examine the extent to which Norfund's equity investment in African Banking Corporation Zambia contributed to the firm's employment creation, respect for labour rights and compliance with labour laws and International Labour standards 2. To assess development results and impacts of this overseas Development Assistance (ODA) funded Public Private Partnership (PPP) Project on local communities and	ITUC-Africa	October - December 2015

	3. To assess the extent to which trade unions participated in decision- making on PPP development.		
Education Gaps and Financing in Zambia	The purpose of this study was to analyse current trends in progress towards achieving full enrolment and quality education in Zambia in Zambia and examine the situation of domestic education financing.	Zambia National Education Coalition (ZANEC)	December 2015- January 2016
Upgrading of Community Schools in Zambia	This proposed study is expected to address the lack of clarity that surrounds the upgrading of community schools between the Government of Zambia on the one hand and community school's non-governmental partners on the other. It will further examine other aspects of upgrading such as processes that the Government intends to use in the upgrading of community schools, the criteria for selecting the community schools to be upgraded, the effects of the upgrading system on beneficiaries as well as monitor the upgrading process itself.	Zambia Open Community Schools (ZOCS)	November 2014 -June 2016

Evaluation of the National Anti-Corruption Policy	The purpose of this study is to assess the challenges and opportunities in the implementation of the	Anti-Corruption Commission (ACC)	March-June 2015
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	National Anti- Corruption Policy. The study mainly focuses on the structures and institutions set up to facilitate effective and efficient implementation of the policy.		
Perception of Immigration services in Zambia	The study sought to find out to what extent information on Zambia's immigration services is easy to get and the levels of satisfaction with overall immigration services among the beneficiaries.	Ministry of Home Affairs (MOHA)	December- December 2015
Mid Term Review for the UNZA Strategic Plan	This is a review of the University of Zambia 2013-2017 Strategic Plan.	UNZA	September - December 2015
The Hidden costs of ART Provision: a case study of Patient costs of accessing ART	The purpose of this study is to understand the hidden costs of ART treatment in Lusaka Province.	International AIDS Economic Network	April 2015- March 2016
Evaluation of the Malaria project in Luapula Province	The project goal was to contribute to a 75 % reduction in number of malaria cases and near zero preventable deaths in 1,000,000 people including pregnant women and children aged 0-59 months old.	World Vision	September 2015- March 2016

Accelerating Progress in Maternal and Child Health	The purpose of this study was monitor H4+ project and dissemination of findings.	Ministry of Community Development Mother and	March 2011-July 2015
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(H4+)		Child Health (MCD-MCH), United Nations International Children's Emergency Fund (UNICEF), United Nations Population Fund (UNFPA), World Health Organisation (WHO)	
Assessment of factors leading to malnutrition in Zambia using Living Conditions Monitoring Survey Data	Using existing data, the purpose of this study is to assess the drivers of malnutrition in Zambia.	Reading University- PhD Research	2013 -2016
HIV Care and support in Zambia	This PhD research focuses on the transformation of counseling as an institution of HIV/AIDS care and support.	Netherlands Scientific Organisation (NWO WOTRO)- PhD Research	2011-2015

Child health Targets Impact Study (chTIS)	The purpose of this multi - country study was to measure the impact of CIP on health and nutrition	John Hopkins Bloomberg School of Public Health	December 2013- December 2016
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	outcomes of children under five years of age; (2) evaluate possible institutional and contextual differences across the selected four countries that may explain differences in child health and nutrition outcomes; (3) review the monitoring/recordkeeping system of the CIP in each country; and (4) assess the cost-effectiveness of the interventions and analyse data for possible sources of differential effects across countries.	(JHSPH)	
Prevention of Mother to Child Transmission (PMCTC) National Evaluation	The purpose of this multi - country study is to evaluate the national PMTCT programme in order to understand the modes of PMTCT service delivery and to inform subsequent PMTCT activities in Zambia.	Population Council	August 2013- August 2016

National Education Assessment Survey (NAS) in Early Grade	The Grade Two NAS is a baseline survey, which is made up of two components i.e. Early Grade	Research Triangle International (RTI)	December 2014-December 2015
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Reading and Mathematics.	Reading Assessment (EGRA) and Early Grade Mathematics Assessment (EGMA). The objective of the Grade Two NAS is to help countries begin thinking of measuring in a systematic way, how well children in the early grades of primary school are acquiring reading skills and ultimately spur more effective efforts to improve performance in this core learning skill.		
Bridging the GAP: Examining Disability and Development in Four African Countries (Kenya, Sierra Leone, Uganda and Zambia)	The purpose of this research is to conduct a comprehensive analysis to explore the apparent gaps between policy formulation and implementation. Secondary analysis of existing data and national data sets will be conducted to highlight the lack of disability-specific information as it relates to multidimensional poverty barriers to inclusion.	Economic and Social Research Council (ESRC)/ University College, London	November 2015- November 2018

Evaluation of the Chikomeni Youth Empowerment Project	Following the implementation of the three year project which Chikomeni Area Development	World Vision	August - October 2015
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	Program had been implementing aimed at empowering the youths since 2013, the purpose of this study was to assess the impact, effectiveness and sustainability of the project as well as to document lessons learned for future programming and provide recommendations on how the positive impacts could be sustained by the program and other partners.		
MDG Comprehensive Review	The 2015 MDG comprehensive Review is expected to reflect on MDGs-related national milestones; trajectory of MDG indicators; successes and lessons from MDG implementation; and reflections on MDG experiences and lessons for Sustainable Development Goals (SDGs).	United Nations Development Programme (UNDP)	October - December 2015
Data collection for the Evaluation Design for Makhalidwe Athu project (MA)	The purpose of this study is to determine if the low-cost, innovative MA intervention can serve as an effective way to improve reading outcomes for students in Zambia.	USAID/University of Chicago	October 2015 - May 2017
Transforming Indigenous Zambian Games National	This is based on a national festival which exhibited and documented Indigenous Games.	Ministry of Tourism and Arts (MOTA)	October 2014 - October 2016

Festival			
Formulation of language policy for Zambia	The purpose of this study is to ascertain the need to formulate a language policy for Zambia.	Government of the Republic of Zambia (GRZ)	January - December 2015
Community involvement in waste management and disposal in Lusaka urban	The overall objective is to explore community perceptions and practices pertaining to involvement in waste disposal so as to develop a sustainable intervention/implementation research.	Directorate of Research and Graduate Studies (DRGS), UNZA	December 2013 -June 2015
The Political Meaning of Informal Urbanism – The New Poor in Lusaka’s Conventional Housing Areas	This is a chapter talks about the new poor in Lusaka’s conventional housing poor.	Response to a call – Study for the production of a Chapter in a book	January 2015 - June 2016
Nationwide Gender Perception Survey	The purpose of this study is to determine nationwide gender perceptions in the country.	Ministry of Gender/ UNDP	September 2015 - June 2016
Undoing Inequity in accessing Water and Sanitation and Hygiene	This was a midterm review of the undoing inequity project in Mwanza West Ward.	Water Aid London School of Tropical Hygiene and Medicine	May 2014 -May 2015

c) Academic and Curriculum

The Institute participated in the development of the Labour Economics Module for Distance Education students. This process is still ongoing and is likely to come to an end in 2016.

d) Workshops and Consultancy

The Institute participated in a number of workshops and seminars. While some of these workshops were organized by the Institute, most of them were organized by other institutions and INESOR was invited to participate. Below are some of the workshops that we participated in:



**Table 4: Summary Of Any Other Research Related Activities (Symposia, Conferences, Seminars, Research Funding Matters)**

<b>THEME OF THE CONFERENCE</b>	<b>DATE</b>	<b>COUNTRY/PLACE OF CONFERENCE</b>	<b>TITLE OF PAPER PRESENTED</b>	<b>MAIN PRESENTER</b>	<b>TARGET GROUP</b>	<b>SPONSOR</b>
Seminar on China-Africa Cooperation in Human Resource Training for Mineral Resources Sectors	8 <sup>th</sup> -9 <sup>th</sup> August, 2015	Yunnan University, Kunming, China	The Role of Human Resource Development in Mineral Led Economic Development: The Case of Development Agreements and Mining Fiscal Regimes in Zambia.	Richard Bwalya	Academicians and Practitioners from All over Africa and China	Centre of African Studies, Yunnan University
Structural Transformation and Africa's Development	15th July – 20 July 2015	Accra, Ghana	Structural Transformation and Africa's Development: The Case of Zambia.	Grayson Koyi	Trade Union Policy makers	International Trade Union Confederation- Africa Region

## 5.0 Reflections

### a) Challenges

Amidst the many achievements that were scored during the period under discussion, a number of challenges which negatively affected the operations of the Institute were experienced. These include:

- Inability or failure to attract bankable research projects due to the change in funding cycles of research partners.
- Low publication record intermittent water and electricity supply occasioned by the load shedding currently being experienced in the country.
- Intermittent internet connectivity caused by the fibre optic cables which were damaged by the car wash dealers along Munali road.
- Inadequate transport.

### b) Outlook for the coming year

The following are some of the highlights for the year 2016:

#### i. Implementation of the Performance Appraisal System

INESOR began the process of institutionalizing the newly introduced Performance Appraisal System. Though the process has not yet been rolled out, preliminary work has already been done and we hope to finalise the process of institutionalizing the system into our operations as a way of improving staff performance.

#### ii. Arrival of Research Affiliate from Japan

The Institute expects to host a Research Affiliate from Tokyo University in Japan. The Researcher intends to conduct a research on Non Communicable diseases for her PhD studies.

#### iii. Commemoration of the 50<sup>th</sup> Anniversary of UNZA.

The Institute looks forward to participating in the commemoration of the 50<sup>th</sup> anniversary of the UNZA's existence. A number of activities have been lined up which we hope to participate in

such as the exhibition and in the drafting of a monograph to document INESOR's 50 years anniversary as part of this celebration.