

Republic of Malawi
JICA Country Analysis Paper

Japan International Cooperation Agency
March 2024

The JICA Country Analysis Paper is a document prepared by JICA that analyzes each country from a development perspective and is intended to be used by development agencies in considering and implementing effective cooperation with the country concerned. It is also intended to provide information from a development perspective for the Japanese government when formulating aid policies such as the Country Assistance Policy. The actual contents of cooperation and projects to be implemented in a country will be considered and determined according to the policies of the Government of Japan, the size of the budget for each fiscal year, and the circumstances surrounding the project.

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List of abbreviations and acronyms

AfDB	Africa Development Bank
AFREXIM Bank	African Export Import Bank
AU	African Union
AIDS	Acquired Immune Deficiency Syndrome
CARD	Coalition for African Rice Development
CPI	Corruption Perceptions Index
DAC	Development Assistance Committee
EU	European Union
FAO	Food and Agriculture Organization
FCDO	Foreign, Commonwealth and Development Office
GDP	Gross Domestic Products
GNI	Gross National Income
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
HDI	Human Development Index
IDA	International Development association
IFC	International Finance Corporation
IFAD	International Fund for Agricultural Development
IMF	International Monetary Fund
JGA	JICA Global Agenda
HIV	Human Immunodeficiency Virus
LDC	Least Developed Country
MCC	Millennium Challenge Corporation
NDC	Nationally Determined Contribution
ODA	Official Development Assistance
PPP	Public-Private Partnership
SADC	Southern African Development Community
SDGs	Sustainable Development Goals
TDB	Trade and Development Bank
TICAD	Tokyo International Conference for African Development
UHC	Universal Health Coverage
UN	United Nations
UNDP	United Nations Development Program
UNFPA	United nations Population Fund
UNICEF	United Nation Children's Fund
USAID	United States Agency for International Development
WHO	World Health Organization
WB	World Bank

*Unless otherwise noted, dollars refer to United States dollars.

1. Current Situation of Malawi

(1) Summary data

The Republic of Malawi (hereinafter referred to as “Malawi”) Malawi is a landlocked country located in southeast Africa, surrounded by Tanzania, Mozambique, and Zambia. Its land area is 118,484 km², about half the size of Honshu (mainland Japan), and it is long and narrow, extending 850 km from north to south, while only 150 km from east to west. Lake Malawi, the third largest lake in Africa, is located in the eastern part of the country. Because of its small size (ranking 9th among the countries of Sub-Saharan Africa), the population density of Malawi is relatively high.

Regarding the last 20 years, the values of the main indicators in 2022 (the latest), 2018 (when the current Country Assistance Policy was formulated), 2014 (economic turning point¹), and 2004 (political turning point²) are shown in Table 1. The average Sub Saharan values for 2022 (or approximate year if data are not available) are also included for comparison.

Malawi is one of the poorest countries in Sub-Saharan Africa, with 71.0% (2022) of the population living below \$1.9 per day (international poverty line), the lowest in the Southern African Development Community (SADC). The electrification rate is 14.2% (2021) nationwide, well below the Sub Saharan average. Health indicators are improving, but completion rates for primary and secondary education are below the Sub Saharan average.

Table 1: Summary Data³

		Subsaharan average	Malawi			
		2022	2022	2018	2014	2004
General	Area (10,000 km ²) ⁽¹⁾	-	118,000 km ² (about 1/3 of Japan)			
	Population (tens of thousands) ⁽¹⁾	-	2,041	1,837	1,648	1,241
	Nation ⁽¹⁾	-	Bantu type (mainly Chewa, Tumbuka, Ngoni, etc.)			
	Religion ⁽¹⁾	-	Christianity (approx. 75%), others (Islam, traditional religions, etc.)			
	Language ⁽¹⁾	-	English, Chewa (official language above), various ethnic languages			
	Gender Gap Index ⁽³⁾	0.682	0.676 (110th)	0.662 (112th)	0.728 (34th)	0.6435 (81st, 2006)
	Gender Inequality Index ⁽³⁾	0.569 (2021)	0.554 (142nd)	0.57 (149th)	0.59 (140th)	-
	Corruption Perceptions (CPI) ⁽⁴⁾	32	34 (110th)	32 (120th)	33 (110th)	28 (90th)

¹ The year in which uranium mines were hit by the international price slump and ceased operations.

² Year of inauguration of the third President Bingu wa Mutharika (his brother was the fifth President Peter Mutharika).

³ Source: (1) Ministry of Foreign Affairs, (2) WB, (3) World Economic Forum, (4) Transparency International, (5) UNDP

Economy	GDP growth ⁽²⁾ (nominal, %)	3.6	0.8	4.4	5.6	5.4
	GNI per capita ⁽²⁾ (\$)	1,638	640	500	520	410
	Unemployment rate (%) ⁽²⁾	6.7	5.6	4.9	5.0	4.9
	Poverty Rate (%) ⁽²⁾	38.8 (2019)	71.0	73.5 (2019)	69.2 (2016)	72.5
	Human Development Index (HDI) ⁽⁵⁾	0.547	0.512 (169th, 2021)	0.510 (172nd)	0.487 (173rd)	0.400 (166th)
	Electrification rate (%) ⁽²⁾	50.6 (2021)	14.2 (2021)	18	11.9	6.9
Health and Sanitation	Under-five mortality rate (per 1,000 live births) ⁽²⁾	73	42 (2021)	48	60	120
	Maternal Mortality Rate (per 100,000 live births) ⁽²⁾	536 (2020)	381 (2020)	392	442	386
	Life expectancy ⁽²⁾	60 (2021)	63 (2021)	63	61	50
Education	Primary Education Completion Rate (%) ⁽²⁾	71 (2020)	56	52	-	-
	Secondary Education Completion Rate (%) ⁽²⁾	44.6 (2020)	19.4	24	-	-

(2) Geopolitical positioning

Malawi gained independence from the United Kingdom in 1964 and became a member of the Commonwealth of Nations. It has maintained close relations with the United Kingdom since independence, and the United Kingdom ranks third in the cumulative amount of actual ODA for the past eight years (Figure 1). It is also the only African nation that maintained diplomatic relations with South Africa during the apartheid era⁴. It has sent many migrant workers to South Africa and was the fourth largest source country of migrants to South Africa in 2022 (Figure 2).

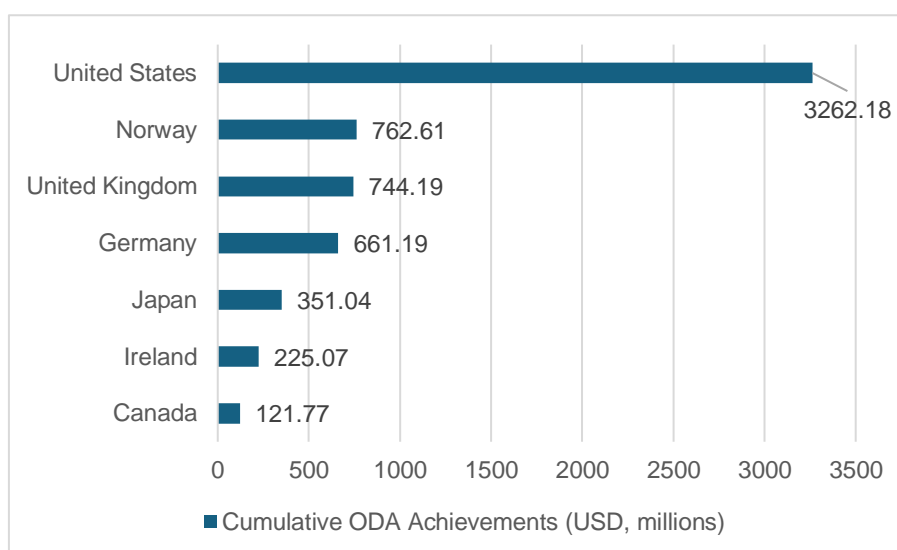
Behind the international scene, it supports the positions of Japan and the West, and has consistently voted in support of Ukraine in resolutions related to Ukraine and Russia at the United Nations. On the other hand, it has also emphasized economic relations with China

⁴ Malawi had sent many migrant workers to South Africa before independence. In 1967, Malawi became the first African country to establish formal diplomatic relations with South Africa, backed by economic assistance from South Africa.

since it broke ties with Taiwan at the end of 2007 and established diplomatic relations with China in January 2008; the president visited China during the 7th China-Africa Cooperation Forum (FOCAC) in 2018 and the 3rd China-Africa Economic and Trade Expo (CAETE)⁵ in 2023. As for TICAD, participation by the President has ceased after TICAD V in 2013; the Minister of Foreign Affairs participated in TICAD 8 held in Tunisia in 2022.

It is a member of SADC and the Common Market for Eastern and Southern Africa (COMESA).

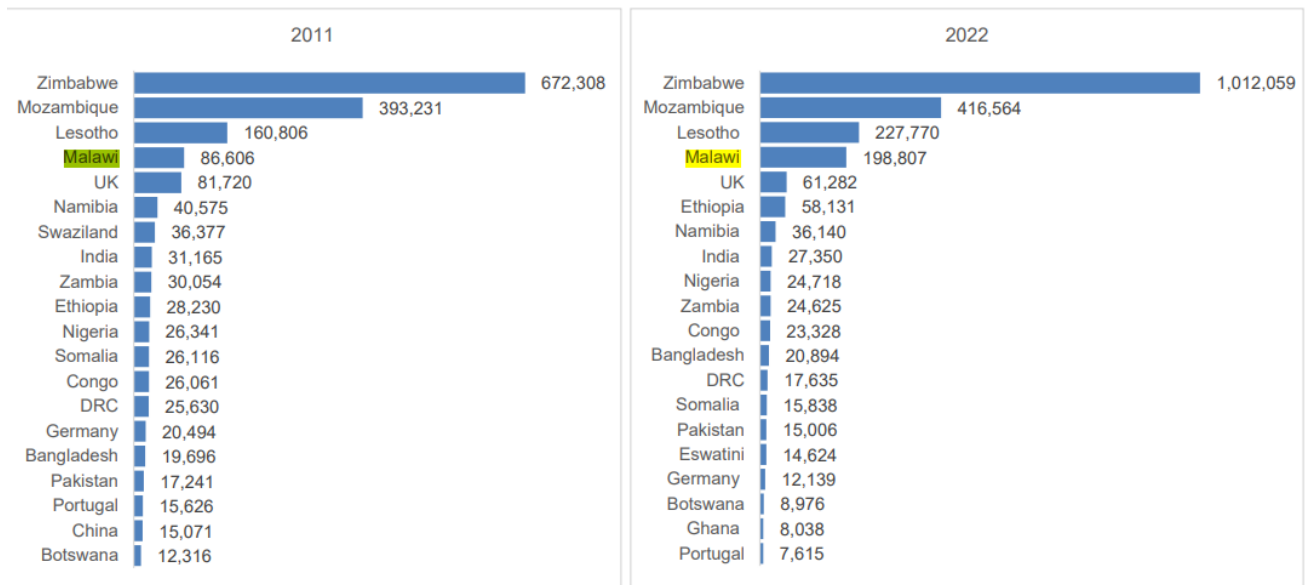
Figure 1: DAC Countries' ODA to Malawi (Top 7 Countries, 2013-2021)⁶



⁵ CAETE is a platform implemented under FOCAC to promote trade between China and Africa.

⁶ Based on OECD database ([Aid \(ODA\) commitments to countries and regions \[DAC3a\] \(oecd.org\)](https://data.oecd.org/development/aid-oda-commitments-to-countries-and-regions-dac3a)).

Figure 2: Countries of Origin of Immigrants to South Africa⁷



(3) Politics

Since independence in 1964, President Banda ruled under a one-party dictatorship, but from 1993 onwards a multi-party system has been in place, and the transition of power has been peaceful, with not a single coup d'etat having occurred.

In the 2019 presidential election, then-incumbent Mutharika narrowly defeated opposition candidate Chakwera, but following allegations of fraud by the opposition, the Constitutional Court ruled in 2020 that the election had been rigged, invalidated the election results, and ordered a re-election. In the re-election held that year, Chakwera defeated Mutharika⁸. The Malawi Congress Party (MCP), led by Chakwera, is not the majority party in parliament (59 out of a total of 193 seats) and has formed a multi-party coalition government. Women occupy 22.9% of seats in the National Assembly⁹.

USAID has identified Malawi as one of the “Bright Spots” (the others are Zambia, Tanzania, etc.)¹⁰ where democracy is expected to deepen in the future and positions it as a priority country for implementing cooperation.

(4) Economy (Industry)

[Real Economy] GNI per capita in 2022 was \$640, which classifies Malawi as a “low-income country” according to the WB’s classification. The key industry is agriculture, with primary

⁷ Republic of South Africa census (2022)

⁸ This is the second case in Sub-Saharan Africa where the results of a presidential election have been overturned by a court decision, after Kenya in 2017. Kenya also held re-elections, but Malawi is the first instance in Africa where an incumbent president was defeated through re-election. (Reference: [Malawi's historic presidential re-election and its impact on African countries: 6 photos International News: AFPBB News](#))

⁹ WB, 2022 (<https://genderdata.worldbank.org/countries/malaw>)

¹⁰ [How Democracy Can Win | Transforming Lives | U.S. Agency for International Development \(usaid.gov\)](#)

products such as tobacco and tea accounting for about 80% of total exports, supporting foreign currency income. Since agriculture is climate-sensitive, the economy vulnerable to external shocks such as natural disasters. In 2020, real GDP growth rate was 0.9% due to the impact of COVID-19, but in 2021, the real GDP growth rate was 4.6% due to strong agricultural growth. In 2022, the figure fell to 0.8% due to the global price increase caused by the Ukrainian crisis, as well as agriculture being hit by a cyclone. However, the economy is expected to grow by 1.6% in 2023 due to growth in tobacco exports¹¹. It is projected to grow at around 3-4% in the coming years.

[Fiscal] Since the suspension of donor financial support in 2013 following the “Cashgate”¹² incident, the budget deficit has become constant due to the deteriorating current account balance and stagnant domestic tax revenues¹³. In the three years from 2020, government spending has increased to cope with multiple crises¹⁴, and the budget deficit reached 10.8% of GDP in 2022. The Malawi government finances its deficit mainly through domestic borrowing, with the bulk of domestic borrowing financed by the central bank, which has led to an exchange rate depreciation and higher inflation rates. The government is aiming at a 5% increase in revenue over the next five years and will focus on rationalizing and prioritizing expenditures in order to restore fiscal health¹⁵.

[Public finance] Malawi has adopted a managed currency system, but the gap with the market rate has widened, with a 25% devaluation against the dollar in May 2022 and a further 44% devaluation in November 2023. Prices have also soared in response to the exchange rate depreciation, with the year-on-year inflation rate in 2022 at 20.8%. To curb price increases, the Central Bank of Malawi raised its policy rate from 18% to 22% in April 2023 and further to 24% in July of the same year. The Malawian government is aiming at limiting the growth rate of broad money, through curbing domestic borrowing, which reached 30.8% in 2023, to about 10% in 2027¹⁶.

[Debt and International Balance of Payments] Public debt has been on the rise in recent years due to the impact of the COVID-19 epidemic and the Ukraine crisis, reaching 75.7% of GDP in 2022 from 54.8% of GDP in 2020. Of this, external debt in 2022 was 34.8%, of which multi-donors accounted for 63.8%, commercial creditors for 22.2%, and bilateral-donors for 10.4%. Among the multilateral-donors, WB is the main creditor, with outstanding debt to WB accounting for 32.8% of total external debt. In terms of debt to commercial creditors (only

¹¹ IMF, 2023

¹² Embezzlement of public funds by government officials uncovered in 2013; over \$356 million was reportedly mishandled, resulting in over 70 arrests. In response to this incident, donors froze financial support and up to 40% of the government budget was raised.

¹³ Tax revenue in 2022 is only 11.8% of GDP, below the sub-Saharan average of 15.6% (2021).

¹⁴ A new coronavirus pandemic in 2020; a global price hike in food, fertilizer, and fuel prices due to the Ukraine crisis in 2022; a cholera pandemic in 2022-2023; and repeated cyclone attacks.

¹⁵ IMF, 2023

¹⁶ IMF, 2023

two), AFREXIM Bank and TDB account for 55.6% and 44.4%, respectively. Of the debt owed to bilateral-donors, 99% is from non-Paris Club countries, with the main creditors being China, India, and Saudi Arabia. Outstanding debt to China is \$222 million, which represents 5.5% of total external debt. Inflows of donor project-related funds and export earnings supported the buildup of foreign exchange reserves, but import demand exceeded this, and the depreciation of the local currency exchange rate resulted in a very low level of foreign exchange reserves in 2022 at \$120 million (about 0.5 months of imports). In 2023, the current account balance improved due to the aforementioned currency devaluation and export controls, but foreign exchange reserves were \$156 million at the end of September, due in part to the impact of large external debt repayments. Going forward, the country aims at recovering foreign exchange reserves to 3.9 months of imports by 2025 under the IMF program described in the latter part of this report¹⁷.

In 2018, a three-year loan of \$112.3 million was approved by the IMF under the Extended Credit Facility (ECF), but the loan was suspended in 2020 after the Malawi government's fraudulent declaration to the IMF (falsification of gross debt and net reserves) was discovered. The government applied again to the ECF in 2021 but was not approved by the IMF due to the need for an audit of fraudulent declarations and restructuring of public debt. In November 2022, under the Rapid Credit Facility (RCF), \$88.3 million in emergency financial assistance through the Food Crisis Response Facility and Program Monitoring with Board involvement (PMB) was approved by the IMF. Two reviews were conducted under the PMB, and the goals were generally assessed as having been met, and in November 2023, a 48-month, \$175 million ECF was finally approved by the IMF's Executive Board.

(5) Progress in achieving the SDGs

Most of the 17 goals are considered key issues. While some indicators, such as the infant mortality rate, are improving, the poverty rate has worsened over the past five years, and many other indicators are not meeting the levels needed to achieve the SDGs.

The gender gap in years of education and the Gini coefficient are improving, and Goal 5 "Gender equality" and Goal 10 "Reduced inequalities" are rated as "Challenges remain," indicating that the level is one step short of achieving the SDGs.

Goal 13, "Climate action," is rated as having been achieved, but the evaluation item does not include an adaptation perspective. Even from the perspective of mitigation, future greenhouse gas emissions are expected to increase, and therefore, the prospect of achievement should be carefully judged.

¹⁷ Ibid.

Figure 3: Status of Malawi's Achievement of the SDGs¹⁸



¹⁸ Sustainable development Report 2023 ([Sustainable Development Report 2023 \(sdgindex.org\)](https://sdgindex.org))

2. Development Policy and Planning in Malawi

(1) Development policy in Malawi

In the long-term national development plan “Malawi 2063 (MW2063)” (2021), the country aims at becoming a commercialized upper middle-income country by 2063 and has identified (1) Agricultural productivity and commercialization (2) Industrialization, and (3) Urbanization as key pillars (Pillars). The “Vision 2020” (2000), which was a long-term national development plan until 2020, aimed at reaching a middle-income economy (GNI per capita of \$1,036) by 2020, but the country’s GNI per capita in 2020 was only \$570, and the goal was not achieved. In reflection of the fact that Vision 2020 did not set monitoring indicators and had a weak implementation monitoring system, MW2063 establishes a national planning committee to monitor progress and ensure consistency with the mid-term plan and sectoral policies. MW2063 is in line with the “Agenda 2063” formulated by the AU.

The “Malawi 2063 First Ten-Year Implementation Plan (MIP-1)” (2021), the mid-term plan for the period from 2021 to 2030, defines, in addition to the above three important pillars of MW2063, seven priority areas (Enablers): (1) Mindset change (2) Effective governance system and institutions, (3) Enhanced public sector performance (4) Private sector dynamism (5) Human capital development, (6) Economic infrastructure, and (7) Environmental sustainability. MIP-1 is largely based on Malawi’s “The Malawi Growth and Development Strategy (MDGS) III,” a medium-term plan developed by the previous Mutharika administration for the period 2017-2022. Given that MIP-1 is a plan until 2030, it sets “achievement of most SDG goals” as one of its milestones.

3. Key Development Issues and Sector Analysis for Malawi

(1) Agriculture

① Current status and development issues (including key indicators)

The agriculture sector is a major industry, accounting for 23.2% of GDP and about 80% of export revenues¹⁹. Tobacco, the sector's largest industry, accounted for about 37% (\$408.4 million) of total exports in 2021, with three products including sugar (7%) and tea leaves (6%) accounting for half of total exports²⁰. In recent years, demand for tobacco has been declining, especially in Europe and the United States, and the issue has been to find alternative means of earning foreign currency, but tobacco is deeply embedded in Malawi's economy and society in a unique way that does not conflict with traditional land ownership²¹, and finding alternative crops has been difficult. Legumes and rice are attracting attention as new export products to replace tobacco. The Malawian government has positioned rice as a strategic export product and is aiming at increasing rice production by joining the Coalition for African Rice Development (CARD) from 2018. However, it faces such challenges as the use of "recycled seeds," which are repeatedly self-seeded and have mixed varieties with low germination rates due to repeated home-growing, and low yields due to lack of adoption of new cultivation techniques such as SRI farming²², and the lack of a rice market.

In addition, about 75% of all Malawians are engaged in agriculture and related businesses, which is a driver of economic growth, but about 90% of the farming population are smallholders (cultivating less than 1 ha), and the amount of arable land per capita is declining as the population has increased²³. Since agriculture in Malawi is based on rain-fed agriculture due to the delay in irrigation development, the yield of maize, a major agricultural product, is greatly affected by the weather, resulting in intermittent food shortages at the national and household levels. In addition, in recent years, damage from pests and diseases, such as the Fall Armyworm and foot-and-mouth disease, and the impact of disasters such as cyclones on agriculture have also become major issues, and sustainable agriculture suited to climate change is sought.

② Development Policies and Plans

The main policies and strategies are developed in line with MW2063 and the AU's Comprehensive Africa Agriculture Development Program (CAADP), which identifies

¹⁹ Annual Economic Report 2021, Ministry of Economic Planning & Development and Public Sector Reforms in Malawi (2021)

²⁰ 2021 - 2022 Agriculture Sector Performance Report: July 2021 - April 2022, Ministry of Agriculture in Malawi (2022)

²¹ While other profitable crops such as tea and sugar are mainly produced on plantations that have been in existence since colonial times, tobacco is mainly produced by smallholders under a traditional land ownership system. (Interview with Prof. Eiichi Yoshida, Yokohama City University)

²² Abbreviation for System of Rice Intensification.

²³ Malawi Economic Monitor: December 2022, The World Bank (2022)

“agricultural productivity enhancement and commercialization” as one of its three pillars. The seven priority areas are: 1) Agriculture Diversification, 2) Irrigation Development, 3) Anchor Farms, 4) Agriculture Inputs, 5) Agricultural Mechanization, 6) Structured Markets, and 7) Agriculture Research, Innovation and Dissemination.

Specific policies are planned and implemented around MIP-1 and the National Agricultural Policy (NAP)²⁴. The issues that urgently need to be addressed in the NAP include soil improvement, agriculture with an awareness of improved nutrition by promoting the cultivation of crops with diverse nutrients, value addition in priority value chains, land management, etc., and a comprehensive strategy is being developed in line with MW2063 and MIP-1.

The main project in the agricultural sector, accounting for about 65% of the budget, is the Affordable Inputs Programme (AIP) for low-income farmers. The FY2022 AIP targeted about 2.5 million beneficiaries and distributed coupons to purchase maize seeds and fertilizers. The project, which has been implemented since 2005²⁵, is aimed at securing maize production from the perspective of food security and is at variance with current efforts to commercialize agriculture. In addition, development partners and other concerned parties have called for the project to be discontinued and replaced with other projects because of its low cost-effectiveness.

The NDC also states that of the 9.87 million CO₂ t of greenhouse gas emissions from the agricultural sector in BAU (Business as usual)²⁶ in 2040, 1.57 million CO₂ t will be reduced through no-till farming and other measures. In addition, as climate change adaptation measures, the government will work to diversify crops, livestock, and aquaculture, and to introduce and expand climate smart agriculture.

③ Cooperation status and plans of other donors

- EU: The main project is KULIMA (Promoting Farming in Malawi), which is implemented jointly with FAO and GIZ. The main program is to strengthen agricultural technologies for farmers through Farmer Field Schools and support agricultural technology research on crop diversification and climate change. KULIMA is also supporting research on agricultural technology for crop diversification and climate change.
- WB: The main project is the Shire Valley Transformation Programme, a 14-year project from 2018 to 2031, implemented in collaboration with AfDB, currently in the implementation phase until 2023. The project is currently developing a huge irrigation scheme covering 43,370 ha in the Shire River basin through the construction of a dam on the Shire River.
- AfDB: In addition to the projects jointly implemented with WB above, AfDB is developing

²⁴ It expires in 2021 and is undergoing revision. (As of December 2023)

²⁵ Prior to the change of administration (FY2019), the project was implemented under the name FISP.

²⁶ Refers to a natural case with no special measures taken.

emergency aid and support measures for fisheries and to deal with food crises caused by climate change, such as droughts.

- FAO: The main project is KULIMA, implemented jointly with the EU and GIZ, followed by the nutrition improvement project. It also focuses on crop pest control, including foot-and-mouth disease in cattle.
- WFP: WFP's main projects are refugee assistance through cash transfers, school feeding programs, and emergency food assistance. In addition, the WFP provides wide-ranging development assistance in the agricultural value chain.
- IFAD: The main projects are irrigation development (PRIDE) in the northern and southern regions (the Sire Valley area is not covered) and support for industrialization of agriculture (TRADE), including promotion of business linkages between farmers and SMEs and improvement of the agribusiness environment.
- USAID: Focusing on the potential for improved nutrition and export markets, USAID is developing a dairy and legume value chain development project for seven provinces in the south-central region.
- GIZ: The main project is KULIMA's Farmer Field School program, implemented jointly with the EU and FAO, with a particular focus on value chain development for soybeans, peanuts, and cassava. Nutrition improvement projects, including school meals, are another priority area.

(2) Industrial development

① Current status and development issues (including key indicators)

As previously mentioned, agriculture, forestry, and fisheries are the largest industry in Malawi, accounting for 23.2% of GDP, followed by manufacturing (12.2%) and wholesale and retail trade (12.2%). MW2063 calls for the promotion of mining and tourism in addition to the major industries mentioned above, but the share of each industry in GDP is low: mining (0.7%) and tourism (5.8%)²⁷.

There are approximately 1.6 million small, medium, and micro enterprises in Malawi, contributing to approximately 47% of GDP. The sector also generates about 1.7 million jobs, which is equivalent to 38% of Malawi's total working age population. Women account for 42% of this employment and contribute to about 15.6% of GDP²⁸.

Approximately 80% of small and micro enterprises in Malawi are micro enterprises with 1-4 employees, and only 2% are medium enterprises with 21-100 employees. This missing middle is the bottleneck in private sector development. By sector, the retail sector accounts for 87% of the total, and many of these firms conduct their business activities in rural areas.

²⁷ Annual Economic Report 2021, Ministry of Economic Planning & Development and Public Sector Reforms in Malawi (2021)

²⁸ The Malawi MSME Survey 2019, Ministry of Trade and Industry

These microenterprises and cooperatives face challenges in improving product quality, obtaining product marketing certification, and access to markets and finance. Weaknesses in the business environment and institutional administrative services also need to be improved. Another challenge is that the percentage of women with bank accounts and the frequency of borrowing from financial institutions are low, and financial inclusion is not well developed, leaving little room for investment and business expansion by women.

② Development Policies and Plans

One of the pillars of MW2063 is “industrialization,” and the following priority areas have been identified: 1) Industrializing Mining, 2) Diversification, Value Addition and Competitiveness largely targeting the Export Market, 3) Creation of Special Economic Zones and Export Processing Zones, and 4) Research, Science, Technology and Innovation. In addition, Enabler (4) Private Sector Dynamism” sets four priorities: 1) Business Environment, 2) Digital Economy Promotion, 3) Micro, Small, Medium, Enterprises Development, and 4) Anchor Firms Development.

In terms of specific policies, the National Export Strategy II, formulated in 2021, aims at strategically developing high-value products in four industries: agriculture, manufacturing, services, and mining, with the goal of increasing Malawi’s exports of national products and services by 22% over five years. In addition, it focuses on emerging markets where Malawi has the potential to export competitively in the African Continental Free Trade Area (AfCFTA) and prioritizes those regions and markets. Another priority is to strengthen the capacity of the Malawi Investment and Trade Centre (MITC), the Malawi Bureau of Standards (MBS), and the Small and Medium Enterprise Development Institute (SMEDI), with the Ministry of Trade and Industry taking the lead.

③ Status of cooperation of other donors

- WB: Supporting the Malawi government’s Financial Inclusion and Entrepreneurship Scaling (FInES) project, which aims at improving access to financial services, promote entrepreneurship, and build MSME capacity.
- GIZ: Active in the development of SMEs, GIZ has created an online platform for entrepreneurs with the Ministry of Trade and Industry to improve the business environment. It has also developed a business training module for SMEs, and together with the capacity building of the Small and Medium Enterprises Development Institute (SMEDI), it provides training and other services to SMEs.
- EU: A vocational training project (Zantchito) is being implemented to create jobs for young people. The EU is also providing support for the development of the Malawi Bureau of Standards (MBS).

(3) Energy

① Current status and development issues (including key indicators)

People's livelihood mainly based on the use of wood and charcoal fuels, the national electrification rate in 2023 is estimated to be 19% (13% on-grid and 6% off-grid), of which the rate is 42% in urban areas and 5% in rural areas, indicating large regional disparities²⁹. Note that this electrification rate includes not only on-grid connections, but also off-grid and solar home system electrification.

As of 2023, the power generation capacity is 535.9 MW³⁰ (including independent power producers), but the future peak demand forecast (standard scenario) is 774 MW in 2030 and 1,130 MW in 2035³¹. Of the total power generation capacity, approximately 398 MW comes from hydropower, making diversification of power sources a major challenge. In addition, large hydropower plants are unevenly located along the Sire River in the south, and the power supply in the north is dependent on small 4.5 MW hydropower plants and transmission from the south, resulting in frequent power outages due to transmission line maintenance and breakdowns. In addition, power supply has not been able to keep up with demand for electricity due to a decrease in the operating rate of power plants caused by water shortages, the suspension of operations due to partial damage to hydroelectric power plants caused by natural disasters, and an increase in demand for electricity due to the rapid population growth. In the area of power transmission and distribution facilities, many substations are experiencing frequent problems due to aging, and power outages are occurring because of problems and repairs. There are also concerns that the power transmission and distribution facilities will not be able to handle future increases in power supply.

Malawi has been focusing on promoting the development of renewable energy sources by independent power producers since 2019. As one of the power sources, an international grid connection project (Mozambique, Zambia, and Tanzania) is also being considered and implemented³². Malawi is expected to connect to the Southern Africa Power Pool (SAPP) and participating in power trading in the region. In addition to the 50 MW that has already been agreed to be imported from Mozambique, which has already been connected to the SAPP, Malawi has requested an additional 70 MW.

② Development Policies and Plans

Malawi Energy Policy 2018 aims at “to increase access to affordable, reliable, sustainable,

²⁹ Malawi Economic Monitor “Powering Malawi's Growth” (World Bank, 2023)

³⁰ [DIGEST OF MALAWI ENERGY STATISTICS](#) (Department of Energy, 2023)

³¹ Demand Forecast, Loss Reduction and Energy Efficiency Strategies Final Report (Department of Energy, 2023). This report reviews the demand assumptions and other factors estimated in the Malawi Integrated Resource Plan 2017-2037.

³² The international trunk line with Mozambique has already been completed and will be connected in Mwanza in southwest Mozambique (2023). Details of the international trunk line with Zambia and Tanzania have not yet been finalized.

efficient and modern energy for every person in the country.” and at strengthening the efforts of each electric utility, including transmission and distribution. The Integrated Resource Plan 2017-2037 sets a goal of providing electricity to approximately 30% of the population by 2030, but the plan is currently under review.

In the President’s policy speech in 2022, he mentioned the goal of adding a total of 1,000 MW to the National Grid by 2025. In the 2023 policy speech the President mentioned that new on-grid connections to 180,000 households and new off-grid connections to 200,000 households will be provided with donor support. The MW2063 vision also emphasizes the importance of diversification of power sources (power source development and the development of international interconnection lines) and stable power supply (development of power transmission and distribution networks) in Pillar 2 “Industrialization” and Pillar 3 “Urbanization” advocated in the vision.

It is also stated in the NDC that of the 19.83 million CO₂t of greenhouse gas emissions from the transportation and energy sector in BAU in 2040, 15.1 million CO₂t will be reduced through the promotion of renewable energy. In addition, as a climate change adaptation measure, the government will work on the design, construction, and management of public infrastructure that is resistant to drought and flooding.

③ Status of cooperation by other donors

- WB: Rural electrification project (Malawi Electricity Access Project) and international interconnected transmission line project with Mozambique (coordinated with EU and KfW) are being implemented. In addition, the Mpatamanga hydropower project (361 MW) by IFC and Electricite de France (EDF) is scheduled to be implemented.
- AfDB: Providing PPP project development advisory support related to a 180 MW hydropower project on the Songwe River.
- MCC: Providing support for the rehabilitation of hydroelectric power plants, rehabilitation and construction of substations, and installation of transmission line SCADA (monitoring and control system) (completed in 2018).
- USAID: Providing support for solar PV (20 MW) and off-grid electrification projects as a part of Power Africa; completion is scheduled for 2024.
- China: Was scheduled to support the Kammwamba coal-fired power plant project (300 MW), but no further action has been taken, and the Malawi government is now seeking to develop the plant through PPP.

(4) Transportation and traffic (including aviation)

① Current status and development issues (including key indicators)

[Roads] As a landlocked country, access to seaports is limited to land transportation via four international corridors (Nacala, Beira, Durban, and Dar es Salaam), and 90% of logistics and

70% of human flow is by road³³. In addition, the total length of roads in the country has reached approximately 15,451 km, of which only 3,240 km (21%) are paved roads. These border barriers and inferior road conditions are the main reasons for higher transportation costs.

[Aviation] Air transportation is extremely important for direct trade with foreign countries, and there are currently two international airports and four domestic airports in operation, with international flights served by Ethiopian Airlines, South African Airways, Kenya Airways, and others. With the exception of Kamuzu International Airport, which received grant assistance to expand its passenger terminal and upgrade its air security facilities, all airport facilities and air security facilities in the country are aging and inadequate, and there is an urgent need to improve safety and efficiency.

[Railway] In the past, a railway that was about 797 km long (Mchinji-Marka and Nkaya-Nayuchi) was laid, with its main line starting from Mchinji, which borders Zambia, to Salima via Lilongwe and going southward to connect with the Sena line of the Mozambique Railway and connected to the port of Beira via Nsanje. It also branched east from Nkaya and connected to Mozambique's Nacala corridor via Nayuchi on the border and linked to the port of Nacala. Many of the related facilities and equipment deteriorated and collapsed due to the development of the road network in the 1980s and 1990s, lack of maintenance and investment in railway-related facilities, natural disaster damage, and theft of railroad materials. In addition, in the southern part of the country, disasters have washed away related facilities and equipment, and some sections are currently inoperable. Railway services are operated by CEAR, a company financed by Vale (Brazil) and responsible for general freight and passenger transport in Malawi, for the transport of coal from the coal mines in Tete Province, Mozambique, to the port of Nacala. In 2020, four Mozambican railroad companies, including CEAR, joined forces under the brand name of Nacala Logistics. The brand manages the Port of Nacala and its over 900 km railway system, which includes coal logistics, general cargo, passenger transport, and port operations at the Port of Nacala.

[Water Transport] There are five ports with inland water transport on Lake Malawi, Lake Chilwa, and the Shire River-Zambezi River, but development has been slow with little private sector participation.

[International corridors] As mentioned above, Malawi, as a landlocked country, depends on regional corridors crossing southern and eastern Africa for passenger and cargo transport. Corridor development, including infrastructure (roads, railway, and water transport), is important for reducing transport time and costs, facilitating trade to promote regional activities such as agriculture and manufacturing, access to international markets, and securing supply chains.

³³ National Transport Policy (2015)

② Development Policies and Plans

Transportation and traffic falls under Pillar 2 “Industrialization” of MW2063, which targets the development of low-cost and competitive transportation infrastructure. In Enabler (6) “Economic Infrastructure,” the objectives are [Roads] to prepare a transport master plan for the construction of a road network linking urban-rural areas and national and international connections; [Railways] strategic planning, modernization and electrification for the development of a railway system to link seaports in neighboring countries; [Aviation] the development of an international airport to improve business efficiency and stimulate tourism; and [Water Transport] the promotion of international trade through roads, railways, and airport connections. The National Transport Master Plan 2017-2037 was developed in 2018 with the support of WB, aiming at (i) reducing transport costs for all modes of transport, (ii) improving transport infrastructure and services, (iii) strengthening the passenger and cargo transport system to shift from road to rail and water transport, to improve safety and connectivity to rural areas and develop international corridors (Nacala, Beira, and Dar es Salaam).

President Chakwera has pledged to improve the Marka-Limbe railway (about 200 km), and in his presidential policy speech in 2023, he mentioned the rehabilitation of 72 km of railways (Marka-Bangula) and the rehabilitation of major roads in the northern, central, and southern regions.

In addition, the NDC lists the implementation of disaster risk management assessment and monitoring in public works projects, including transportation infrastructure development, and the review of building standards to incorporate climate change considerations, as climate change adaptation measures.

③ Status of cooperation of other donors

[Roads]

- EU and EIB: Rehabilitation of a total of 347 km of roads, including National Highway 1 (M1), and the conversion of roads in Lilongwe City to 6 lanes are underway.
- EU and AfDB: Phase 5 of the multi-national Nacala road development project, which aims at facilitating transport and trade across three countries, is underway, including construction of two OSBPs and rehabilitation of 75 km of roads between Liwonde and Mangochi; scheduled to be completed in June 2024.
- AfDB and OPEAC: Rehabilitation of a total of 160 km on National Highway 5 (M5), scheduled to be completed in June 2024.
- China: A total of 10 km of a 4-lane project on the M1 is underway.
- WB: Rehabilitation of 67 km of National Route 3 (M3) between Liwonde and Zomba is underway.
- MCC: Up to 300 km of public roads, mainly in rural areas, are scheduled to be rehabilitated for the purpose of improving market access for small farmers.

[Aviation]

- WB: Conducted feasibility assessment of airport public-private partnership for 5 airports (completed in 2021).
- EIB: Implementing an aviation safety enhancement project at Chileka International Airport and Kamuzu International Airport since 2014. Support for the development of Chileka International Airport is under consideration.

(5) Water

① Current status and development issues (including key indicators)

A stable Urban Water Supply where secondary and tertiary industries are concentrated is essential and important for economic development through industrial promotion. However, the Urban Water Supply Rate in the capital city of Lilongwe is 83%³⁴, and even in Blantyre, the second largest city and business center, the rate is not high at 74.6%³⁵, which is low compared to the average urban water supply rate of 85%³⁶ in Sub-Saharan Africa, excluding high income countries. In addition, over the past 15 years, Malawi has recorded a population growth rate of just under 3%, with particularly high growth rates in the urban areas of Lilongwe (3.8%) and Mzuzu (5.4%)³⁷, and water demand has increased in line with population growth. Improving the Urban Water Supply Rate is an issue that needs to be addressed in order to promote industry and respond to the growing population.

Furthermore, while the national average rate of access to safe water is 67%, there are regional disparities, ranging from 87% in urban areas to 63% in rural areas. Due to aging, improper management, and other challenges, 23% of wells and other water sources (water points) across the country are not functioning, and 37% of households in rural areas and 13% in urban areas have to spend more than 30 minutes to access safe water. Water carrying is often done by women, children, and improving access to safe water is an important issue for women's empowerment and children's health (UNICEF Malawi, 2020)³⁸.

② Development Policies and Plans

In MW2063, Enabler (5) "Human Capital Development," the goal is to achieve a water supply rate of 100% in urban areas by 2030. The National Water Resources Master Plan aims at increasing the water supply rate as well as reducing the non-revenue water rate to less than 20-25%.

In addition, the NDC includes sustainable use of water resources and enhanced monitoring,

³⁴ [LWB-Strategic-Plan-FINAL_3.pdf](#)

³⁵ Summary of the Final Report of the Information Collection and Verification Study (QCBS) for the Urban Water Supply Sector, Malawi, [12335394.pdf \(jica.go.jp\)](#)

³⁶ [People using at least basic drinking water services, urban \(% of urban population\) - Sub-Saharan Africa \(excluding high income\) | Data \(worldbank.org\)](#)

³⁷ [2018 Malawi Population and Housing Census Main Report \(macoha.mw\)](#)

³⁸ [Water, sanitation and hygiene | UNICEF Malawi](#)

as well as the construction of multi-purpose dams, as climate change adaptation measures.

③ Status of cooperation of other donors

- AfDB: Under a development plan for the corridor leading to Mtwara Port in Tanzania (including Tanzania, eastern Malawi, northern Mozambique, and eastern Zambia), a \$15 million project is underway to improve water supply facilities, sanitation, and capacity building in and around Nkhata Bay, Malawi. In Blantyre, a project to improve water pipelines in poor areas is planned.
- WB: IDA is implementing a \$100 million project (75% loan, 25% grant) for non-revenue water reduction in Lilongwe. Also, in Blantyre, IDA is implementing a \$148.5 million project for water distribution, drainage, and non-revenue water reduction.
- EIB: Projects have been implemented in Lilongwe for the rehabilitation of the Kamuzu Dam and water supply facilities and the expansion of the water purification plant for a total cost of 29 million euros. In the south, a project is underway to construct a new water treatment plant, water supply network, and water storage tanks.
- Export-Import Bank of India: Scheduled to implement a project to construct a new water intake point in Blantyre.

(6) Disaster prevention (including urban planning)

① Current status and development issues (including key indicators)

Malawi is located in the Great Rift Valley of Africa and has an undulating topography. In the southern part of the country, where the elevation is lower, especially in areas where rivers and major highways are concentrated, floods and other damage caused by prolonged rainfall and cyclones have become a common occurrence. The country is highly vulnerable to disasters due to various factors, including rapid population growth, poverty, weak buildings and infrastructure, lack of access to information and knowledge among the population, and climate change. The country's main industry, agriculture, is dependent on rainwater, making it susceptible to disasters (floods, droughts, strong winds, etc.), which often cause food shortages and economic instability. Since 2016, cyclones and heavy rains have caused major floods and droughts every one to three years. In particular, Cyclone Ana in January-February 2022 affected approximately 946,000 people, and about one-third of the country's electricity was lost due to the collapse of hydroelectric power plant facilities. People's livelihoods and socio-economic infrastructure were severely affected, turning into a factor causing food shortage and increasing poverty. In addition, in March 2023, Cyclone Freddy, a Category 5 cyclone, affected 2,267,500 people, and the total damage amounted to more than US\$500 million, the largest damage ever recorded.

Due to lack of funds and other factors, disaster risk management activities such as risk assessment, monitoring, early warning, and disaster response, as well as coordination and

information sharing among stakeholders are insufficiently implemented during normal times. Under these circumstances, disaster risk should be taken into account in planning, design, and construction when installing infrastructure in flood-prone areas. In addition, in the mid- to long-term, it is necessary to review urban structures and formulate urban plans based on the understanding of the topography and hazard analysis.

② Development Policies and Plans

In Malawi Growth and Development Strategy (MGDS) III (2017-2022), climate change issues were addressed across sectors in agriculture, water development, and environmental management, aiming at improving weather and climate monitoring systems and strengthening community resilience for early warning and rapid response. MW2063 also emphasized the importance of addressing climate change, advocating the integration of disaster risk education and financing into sustainable development and planning, adaptation and mitigation of climate change through green economy measures, and the promotion of capacity building for sustainable livelihoods. The National Disaster Risk Management Policy 2015 was developed based on the Disaster Relief Preparedness Act of 1991, and outlines a strategic and comprehensive policy for overall national resilience, aiming at mainstreaming disaster prevention and mitigation, strengthening disaster response capacity, and more. The National Resilience Strategy 2018-2030 targets “a country free of chronic vulnerability, and food, and nutrition insecurity, where sustainable economic development creates opportunities for everyone, and where people are resilient to economic and environmental shocks that affect their lives and livelihoods”³⁹. Although the development of early warning mechanisms and social security have been identified as areas to be addressed, there are many policies and strategies that have not yet been realized, and the country faces fiscal constraints and other challenges.

In April 2023, the Disaster Risk Management Bill was passed to replace the Disaster Relief Preparedness Act of 1991. The new bill proposes to establish an Office of the Commissioner for Disasters and a Disaster Risk Management Trust Fund.

③ Status of cooperation of other donors

- WB: WB has shifted from post-disaster recovery response support to proactive disaster management support, and is considering flexible investments in resilient urbanization and continued investments in early warning and disaster response systems to strengthen natural resource management, urban resilience, and disaster preparedness. In addition, emergency response funding for natural disasters has been provided to the agricultural sector. Also, as an emergency response, assistance was provided for the restoration of cyclone-damaged hydroelectric power plants and power transmission and distribution

³⁹ [National Resilience Strategy \(final\) \(unicef.org\)](https://www.unicef.org/malawi/national-resilience-strategy-final)

networks. The WB plans to support the development of hazard maps for urban areas, but the details are not yet known.

- AfDB: Although its main focus is on post-disaster emergency assistance, the AfDB has identified mainstreaming climate change measures in the infrastructure sector as one of its challenges.

(7) Health and hygiene (including nutrition)

① Current status and development issues (including key indicators)

In terms of the Human Development Index (HDI), Malawi ranks near the bottom at 169th out of 189 countries⁴⁰. Health indicators tend to be improving⁴¹, but the prevalence of infectious diseases is still high, with malaria cases at 219.2 per 1,000 patients⁴², accounting for more than 30% of outpatient cases and the leading cause of death among children under 5 and pregnant women⁴³. HIV/AIDS has affected 8.8% of the population aged 15-49, more women (10.8%) than men (6.4%), and more prevalent in urban areas (14.6%) than in rural areas (7.4%) (2017: DHS)⁴⁴. The maternal mortality rate is 349 per 100,000⁴⁵; the neonatal mortality rate is 19 per 1,000⁴⁶; the mortality rate for children under the age of 5 is 42 per 1,000⁴⁷; and the per capita birth rate is 4.4 persons. Health-related budget accounts for 9.8% of the national budget, and 54.5% of the total national health expenditure relies on external support from development partners⁴⁸. In addition, shortages in the number of health care workers (doctors: 0.5 per 10,000 people; nurses and midwives: 7.1)⁴⁹ and the shortage of medical supplies (number of beds to patients: 1.3 beds per 1,000 patients)⁵⁰ remain a challenge.

In addition, according to UNICEF, only 26% of the population has access to basic sanitation, 6% of the population practices outdoor defecation, and only 10% of all households have hand washing facilities with soap. Poor sanitation has led to frequent cholera epidemics, with

⁴⁰ [Human Development Index | Human Development Reports \(undp.org\)](#)

⁴¹ Between 2018 and 2021, the maternal mortality rate improved from 39.2 to 38.1 (vs. 100,000), the neonatal mortality rate from 34 to 31, and the under-five mortality rate from 48 to 42 (all vs. 1,000).

⁴² [Incidence of malaria \(per 1,000 population at risk\) - Malawi | Data \(worldbank.org\)](#)

⁴³ [World Health Organization Malawi Country Cooperation Strategy: 2017 to 2022 | WHO | Regional Office for Africa](#)

⁴⁴ [Malawi Demographic and Health Survey 2015-16 \[FR319\] \(dhsprogram.com\)](#)

⁴⁵ [Human Development Index | Human Development Reports \(undp.org\)](#)

⁴⁶ [Mortality rate, neonatal \(per 1,000 live births\) - Malawi | Data \(worldbank.org\)](#)

⁴⁷ Ibid.

⁴⁸ Fujita Planning Co., Ltd. and K.I.T.O Architects & Engineers Inc., "Information Gathering and Confirmation Study on Health Care Facilities and Equipment in the Wake of the African Region Novel Coronavirus Outbreak," February 2022.

⁴⁹ [World Health Statistics 2022 \(who.int\)](#)

⁵⁰ [Hospital beds \(per 1,000 people\) - Malawi | Data \(worldbank.org\)](#)

cholera outbreaks in 2022-2023 costing the country \$57 million, or 1.1% of its GDP⁵¹. Droughts and floods, which have increased in recent years, have a significant impact on children and women in terms of health, sanitation, and nutrition, and are a particularly high priority group in the early stage of emergency relief⁵².

② Development Policies and Plans

In MW2063, Malawi has advocated “Human Capital Development” in Enabler (5), aiming at achieving UHC where all people have access to quality, equitable, and affordable health care. The Malawi Health Sector Strategic Plan III (HSSP III) 2023-2030 sets out nine priorities to achieve UHC, with the goal of improving health financing and patient satisfaction. The National Health Policy 2018-2030 aims at achieving UHC through community participation, decentralization, and mobilization of both public and private resources. Digital Health Strategy 2020-2025 aims at establishing a digital health system for efficient delivery of services.

③ Status of cooperation of other donors

- USAID: Projects to promote HIV/AIDS prevention and treatment are being implemented throughout the country. Projects to improve nutrition and sanitation are being implemented in the northern and central regions. In addition, a project to improve the use of health information systems is being implemented throughout the country.
- GIZ: GIZ has been implementing projects on health services for pregnant women and their children for many years. It had also been implementing a project to improve the quality of health services and the use of health information systems.
- UNICEF: Many projects are underway with emphasis on maternal, newborn, and child health, improved nutrition, and early childhood education.
- WB: Financial support for the provision of medicines, strengthening of capacity for financial and project management, and COVID-19 response is underway. Support was also being provided for improving nutrition for children under 5 years old and for HIV/AIDS control.
- FCDO: Currently funding projects to halve maternal and neonatal deaths (UNICEF, UNFPA, WHO are implementing agencies).

(8) Education

① Current status and development issues (including key indicators)

⁵¹ In 2022-2023, cholera epidemics reached record levels, causing 1,727 deaths (WHO, [20230504_multi-country_outbreak_cholera_sitrep-2.pdf \(who.int\)](#)). In addition, during the rainy season, when these outbreaks are more prevalent, cyclones often strike and cause damage, and flooding and other factors further spread infections.

⁵² [Water, sanitation and hygiene | UNICEF Malawi](#)

Following the 1990 resolution on “World Conference on Education for All,” the Malawi government in 1994 made primary education (8 years) free of charge, which significantly improved enrollment rates, with the net enrollment rate for primary education reaching 88% in 2022⁵³. On the other hand, the retention rate for primary education is nearly 25.0% (in 2022), and the primary education completion rate is only 56% (in 2022), and the Malawi government shoulders significant problems regarding the internal efficiency of education.

Although the number of students enrolled in secondary education increased with the introduction of free primary education, the secondary education enrollment rate in 2022 was 16.6%. In addition, the number of qualified secondary teachers is insufficient for the rapidly increasing number of students. Although the number of teachers with primary education qualifications has been reassigned as secondary teachers to cope with the shortage, problems remain in terms of the quality of education.

According to the SACMEQ (Southern and Eastern Africa Consortium for Monitoring Educational Quality), an academic achievement survey of sixth-grade students in 10 Southern African countries conducted from 2015 to 2019, Malawi ranked ninth in 2013 in both reading and mathematics out of 11 countries surveyed, and in 2019, Malawi ranked last in reading and second from the bottom in mathematics out of 10 countries surveyed.

② Development Policies and Plans

Under Enabler (5) “Human Capital Development” in MW2063 announced in 2020, the goal is for all citizens to have access to 12 years of primary and secondary education by 2063, among other things.

Under the National Education Sector Plan 2008-2017, a medium-term education plan, three areas of improvement were advocated: access, equality, quality, relevance, governance, and management of the education system.

The National Education Sector Investment Plan (NESIP) 2020-2030), which was formulated in 2020, continues to focus on three key areas: “access and equity,” “quality and relevance,” and “governance and management.”

In 2021, the Open, Distance and e-learning Department was established in the Ministry of Education to promote remote education.

③ Status of cooperation of other donors

- USAID: The National Reading Program is being implemented to improve reading comprehension in Chewa and English for grades 1-4. The program supports curriculum revision, development of teaching materials, and teacher training.
- FCDO: Implementing National Numeracy Program to improve academic achievement in

⁵³ 2022 Malawi Education Statistics Report, Ministry of Education of Malawi; hereafter in this section, sources are the same unless otherwise noted.

mathematics in grades 1-4. Supporting curriculum revision, development of teaching materials, and teacher training.

- WB: The Malawi Education Reform Program (MERP) is being implemented from 2022 to 2025 to improve the learning environment in primary education by providing school subsidies and promoting girls' education.

(9) Public financial management

① Current status and development issues (including key indicators)

Since 2020, Malawi has experienced a variety of shocks, including the COVID-19 pandemic, food and fertilizer price spikes due to the Ukraine crisis, a cholera epidemic, and damage from multiple large-scale cyclones. In response, the World Bank mobilized approximately \$400 million from the IDA's Crisis Facility, and the IMF disbursed nearly \$290 million under the RCF over the past three years. Despite this massive external financing, the country faces a large budget deficit of 10.8% of GDP in 2022 due to overspending caused by the government's weak capacity to manage public finances and revenue shortfalls caused by optimistic budget projections. The deficit is largely financed by high-cost domestic borrowing. In addition, since the 2013 Cashgate incident, financial support and grant aid from donors, which had averaged 4-5% of GDP each year, have declined significantly. Due to increased borrowing from domestic sources and non-concessional borrowing from regional development banks, public debt increased significantly, and although it was 32% of GDP in 2013, it is expected to increase to 55% of GDP in 2020, 75.7% in 2022, and 82.1% in 2023⁵⁴.

The government is using the Integrated Financial Management Information System (IFMIS) and the Public Sector Investment Program (PSIP) to manage public finances, but due to the mix and complexity of the systems, they are not being properly utilized.

In the IMF/WB Debt Sustainability Analysis (DSA), the external risk was rated as "moderate" in September 2020, but in November 2021, both external and public debt were rated as "high" risk for a debt crisis, and in December 2022, the Malawi government was rated as "in debt distress." Although the ratio of external debt to GDP is below the threshold in the baseline scenario of the authorities' debt restructuring strategy, the ratio of public debt to GDP remains above the 140% threshold in the medium to long term (DSA, 2022).

Fiscal discipline must be tightened and budget forecasts and public financial management (PFM) must be realistic in order to control budget deficits and public debt.

② Development Policies and Plans

The Government of Malawi is reforming fiscal management through a new public finance management act. The Public Finance Management Act, approved in March 2022, calls for

⁵⁴ [Malawi: Second Review Under the Staff-Monitored Program with Executive Board Involvement and Request for an Arrangement Under the Extended Credit Facility-Press Release; Staff Report \(imf.org\)](#)

financial restoration by addressing institutional weaknesses and fiscal consolidation through the establishment of a single account for the Ministry of Finance, placing greater emphasis on reporting from state-owned enterprises, clarifying the responsibilities of public officials, and imposing disciplinary measures for misuse of government resources.

It should be noted that the improvement of overall public investment management is strongly requested by the IMF and WB in the implementation of their respective financial assistance: the IMF provides assistance through AFRITAC, a regional technical assistance organization, and the WB has requested the Department of Economic Planning and Development under the Ministry of Finance for proper monitoring of the PSIP at policy dialogues.

③ Status of cooperation of other donors

- WB: Malawi is subject to the Sustainable Development Finance Policy, which sets policy actions on the submission of comprehensive PSIP reports and public investment management in order to strengthen debt management.
- IMF: Technical cooperation by the East African Technical Cooperation Center (AFRITAC East) and assistance on improving the efficiency of the PSIP process and formulation of a public investment framework are being implemented. Policy actions on public investment management are being set.
- GIZ: The GIZ has implemented support to strengthen fiscal and economic management (2022-2025). Focusing on the legal framework and the new IFMIS, support is being provided for the training for IFMIS users, DXing of financial administration for the Malawi Revenue Authority, improvement of the public contract management system, and strengthening of internal business processes and IT systems.
- EU: The EU has implemented the “Chuma cha Dziko” program to strengthen public service accountability in public financial management. It will strengthen and restructure the operational infrastructure, including the Integrated Tax Administration System (ITAS) to enhance procurement and contract management, monitoring of public corporations, and improving the collection capacity of the Malawi Revenue Authority. By sending four long-term experts, it is focusing on revenue policy, internal controls, procurement and contract management, as well as strengthening oversight of state-owned enterprises.

(10) Natural resource management

① Current status and development issues (including key indicators)

The country’s greenhouse gas (GHG) emissions are among the lowest in the world,

amounting to only 19.34 MTCO₂e (0.02% of total global GHG emissions) in 2019⁵⁵. However, with population growth, the country's total GHG emissions are expected to reach 42.34 MTCO₂e in 2050, about four times the current level, and the country needs to shift to climate resilient growth in various sectors⁵⁶.

The direct impact of population growth on natural resources in the country is the conversion of forests to agricultural land and deforestation due to the growing demand for firewood and charcoal as a source of energy. In particular, the latter (deforestation) is a problem that is unique to the country, where the production and supply of energy, such as electricity, has not kept pace with demand, forcing people to rely on wood and charcoal for their livelihoods. According to the WB, 97-98% of all households still depend on solid biomass fuels such as firewood for their livelihoods⁵⁷. In 2020, the Malawi government amended its forest laws to ensure proper forest management and increased fines for illegal firewood production, but the system has been ineffective, and it is estimated that over 90% of firewood used by people still comes from illegal deforestation. In addition, the government is unable to properly manage natural resources due to various issues such as inadequate manpower and activity expenses caused by lack of financial resources. Currently, the government is aiming at conserving forests through the inflow of external funds through frameworks such as the Bonn Challenge, African Forest Landscape Efforts, and REDD+, following trends such as Climate Finance, and there have emerged scenario analysis results indicating the creation of a carbon credit market worth \$24.8 to \$74.3 million per year⁵⁸.

② Development Policies and Plans

The Malawi government submitted an updated NDC in 2021, setting a target for climate change mitigation measures to reduce greenhouse gas emissions by 6% below BAU by 2040 (and by an additional 45% if international support is obtained). As adaptation measures, the government has advocated establishing systems to coordinate cross-sectoral efforts to address climate change, promoting research on climate change and its impacts, and strengthening the resilience of vulnerable populations to climate change⁵⁹. In Enabler (7), "Environmental Sustainability," of the MW2063, the government is aiming at the sustainable use of environmental resources through the promotion of waste disposal and recycling, a shift to environmentally friendly cooking methods, and a review of land ownership. It also aims at achieving an annual deforestation rate of 0.22% by 2063, which falls into the High Forest Cover category according to the REDD Secretariat's criteria (the indicator was 1.6%

⁵⁵ Emissions from the agricultural sector (including livestock) were the highest at 7.86 MTCO₂e, followed by the energy sector (including transportation) at 1.61 MTCO₂e (of which 1.18 MTCO₂e was transportation-related and mainly attributable to biomass fuels).

⁵⁶ [World Bank Document](#)

⁵⁷ Ibid.

⁵⁸ Ibid.

⁵⁹ [Carbon Counts Report \(unfccc.int\)](#)

in 2018). In the National Forest Landscape Restoration Strategy (2017), the government aims at planting trees on agricultural lands, involving local residents in afforestation and forest management, and restoring watershed forests. In the National Charcoal Strategy 2017-2027, the government aims at shifting to environmentally friendly cooking methods, sustainable firewood production, and strengthening the crackdown on illegal firewood production.

③ Status of cooperation of other donors

- WB: Riverine improvement through afforestation in the southern part of the country is underway.
- UNDP: Supporting job creation through afforestation in Blantyre, Ntcheu and Dedza.
- Global Environmental Facility (GEF): Working to improve livestock production and conserve biodiversity in the Sire River basin and to improve the landscape through afforestation in Mangochi, Balaka, and Ntcheu.
- USAID and FCDO: Reforestation and sustainable firewood production activities through the “Modern Cooking for Healthy Forests” project and the introduction of cooking stoves.
- USAID: Supported the development of the National Charcoal Strategy 2017-2027 and the National Forest Landscape Strategy.
- GIZ and FAO: Landscape improvement and promotion of biodiversity through afforestation in Ntcheu.

(11) Others (gender, refugees)

① Current status and development issues (including key indicators)

[Gender] Malawi ranks 110th out of 146 countries in the 2023 Global Gender Gap Index (Japan ranks 125th globally)⁶⁰, and women continue to be disadvantaged in terms of economic participation. In the education sector, the gender gap is improving, with an 84% gender parity rate in secondary school enrollment and a 6:4 ratio of male to female students at public universities, but statistics clearly show that women are in a weaker position than men mainly in economic indicators such as salary and political participation. In addition, 42.1% of women in Malawi aged 20-24 were married before the age of 18, and 16.6% of women aged 15-49 have suffered physical and sexual violence (GBV: gender-based violence) by a current or former intimate partner in the past 12 months, according to the data, indicating that improvement is sought⁶¹.

[Refugees] Malawi has been hosting approximately 50,000 refugees from the Democratic Republic of Congo and neighboring countries such as Burundi and Rwanda, and the number of refugees and asylum seekers is on the rise, with hundreds of new arrivals each month, while the prospects for their return are uncertain and their stay in Malawi is prolonged. The

⁶⁰ [WEF GGGR 2023.pdf \(weforum.org\)](#)

⁶¹ <https://data.unwomen.org/country/malawi> (UN Women, 2018)

government does not allow refugees freedom of movement or employment and has adopted an encampment policy. However, only one camp, Dzaleka Refugee Camp, is currently established in the country, with a capacity of just over 10,000 people, and the camp is overcrowded. The government is planning to establish a new refugee camp in Chitipa, which the UNHCR is supporting. Another challenge is the limited livelihood improvement and vocational training for refugees and host community residents.

② Development Policies and Plans

[Gender] In the National Gender Policy 2015⁶², Malawi advocates initiatives in gender mainstreaming in education, health, HIV/AIDS, agriculture and nutrition, climate change, and poverty reduction; women's participation in politics and decision-making; and gender-based violence (not revised since). In addition, a national action plan has been developed to end the prevalence of gender-based violence⁶³.

[Refugees] The Malawi government has adopted an encampment policy to accommodate refugees, a policy that has been strengthened in recent years. Although there are plans to establish a new refugee camp in Chitipa, the realization of these plans is taking time, and UNHCR and other donors have expressed concern about the Malawi government's strengthening its current policy of accommodating the 50,000-plus refugees in the country in the Dzaleka Refugee Camp, which has a capacity of slightly more than 10,000 people.

③ Status of cooperation of other donors

[Gender]

- AfDB: In AfDB's Strategy for 2013-2022, AfDB supports the promotion of gender equality by strengthening women's legal rights, women's economic empowerment, and gender-related capacity building.
- UN Women: Projects on narrowing the gender gap by supporting the adoption of climate resilient agricultural technologies, building value chains to improve incomes, and leveraging technology have already been implemented⁶⁴.
- UN Trust Fund: Support for raising awareness of "gender-based violence" in the Dzaleka Refugee Camp is underway⁶⁵.

[Refugees]

- UNHCR: Working with donors and development partners, UNHCR is providing comprehensive support for refugee camp operations and protection of refugee rights.

⁶² [National Gender Policy 2015.pdf \(rmportal.net\)](#)

⁶³ <http://gender.gov.mw/index.php/documents/publications?download=8:nap-on-unscr-1325-on-women-peace-and-security>

⁶⁴ [Evaluation Report-Global Accountability and Tracking of Evaluation Use - GATE System \(unwomen.org\)](#)

⁶⁵ [Creating a safe space for refugee women and girls in Malawi | UN Women - United Nations Trust Fund to End Violence against Women](#)

- Government of Japan: The Government of Japan (GOJ) has been providing assistance to refugee camps through UNHCR in the supplementary budgets for 2018, 2020, and 2021. In 2018, the GOJ constructed new houses to ease refugee camp congestion, improved water and sanitation conditions by constructing wells, water pipes, and latrines, and creating jobs related to these construction activities, thereby strengthening the community's organizational capacity. In 2020, the GOJ expanded residential areas to ease congestion in refugee camps, built water and sanitation facilities, installed solar-powered irrigation systems to improve food security and health, and provided economic assistance to some refugees and host communities for the purpose of addressing COVID-19. In 2021, the GOJ provided health care assistance, improved water/sanitation and the living environment and distributed hygiene products (disinfectant, soap, masks, etc.), and provided infection prevention assistance through education to educate children in need of protection about the risk of infection with COVID-19.

4. Key Development Issues and Sectors That Should be Addressed by JICA

(1) Status of cooperation with Japan and JICA

Under the current Country Assistance Policy (formulated in 2018), grant assistance projects were implemented in the areas of electricity, transport, education, and water. In technical cooperation, Japan and JICA cooperated in the areas of agriculture, natural resource management, transport, water, and health, and the cumulative results of assistance rank 7th in the Sub-Saharan Africa region. In particular, in technical cooperation, Japan and JICA have implemented cooperation with a view to disseminating the results while utilizing local resources, and the effectiveness and impact of the cooperation have been highly evaluated. In addition, a good model of inter-scheme cooperation was observed, as participants in the issue-specific training put the training content into practice after their return to their home countries, with the results leading to the initiation of technical cooperation projects. On the other hand, sustainability issues have as remained as there were cases where the results were not continued after the JICA projects ended due to budget shortfalls.

JICA has deployed the largest number of cooperation members in the world (cumulative total of 1,903 persons)⁶⁶ and celebrated the 50th anniversary⁶⁷ of the deployment in 2021.

Key initiatives in recent years by field and sector are as follows:

<Agriculture>

- Implemented the technical cooperation project “Project for Market-Oriented Smallholder Horticulture Empowerment and Promotion (MA-SHEP)” from 2017; contributed to improving the income of small farmers throughout Malawi; and there are plans to support the improvement of rice production capacity through a new technical cooperation project, “Project for Promotion of Rice Production and Marketing,” starting in FY2024.

<Human Resources Development>

- Contributed to the training of qualified secondary school teachers through the grant aid “The Project for Expanding and Upgrading the Domasi College of Education.” In addition, the technical cooperation project “School for All Project” is underway to help improve the quality of primary education through the development of a community-collaborative school management model.

<Economic Infrastructure Development>

- In the water sector, “The Project for Strengthening the Capacity of Non-Revenue Water Reduction for Lilongwe Water Board” is being implemented in collaboration⁶⁸ with the

⁶⁶ As of December 2023.

⁶⁷ President Chakwera also contributed a congratulatory note to the 50th anniversary of the overseas cooperation volunteers.

[JOCV 50thBOOK JPN 0217 \(jica.go.jp\)](#) [JOCV 50thBOOK ENG 0304-2 \(jica.go.jp\)](#)

⁶⁸ Malawi is currently the only country in Africa where JICA experts are dispatched from Japanese local government waterworks bureaus. The relationship between Yokohama and Malawi is deep, and following

Yokohama Municipal Waterworks Bureau.

- In addition, through the technical cooperation project “The Project for Conservation and Sustainable Management of Dzalanyama Forest Reserve,” JICA cooperated in the conservation of water source forests in the capital city of Lilongwe. Based on the results of this project, an individual expert “Advisor for Sustainable Conservation and Sustainable Management of Dzalanyama Forest Reserve” is scheduled to be dispatched.
- In the power sector, a power generation facility with a maximum output of 19.1 MW was established through “The Project for Expansion of Tedzani Electricity Hydropower Station” in 2021. In addition, the ongoing grant assistance “The Project for the Improvement of Substations in Lilongwe City” will contribute to the stable supply of electricity through the rehabilitation of aging substation facilities.
- In the field of transport, the Japanese government extended and renovated the terminal building at Kamuzu International Airport through grant assistance, which was originally constructed with Japanese yen loan and also provided human resources development in air traffic control to support safe aircraft operations. A technical cooperation project, “The Project for Capacity Development in Airport Maintenance Services,” is currently underway. In addition, a grant assistance project, “The Project for the Improvement of Main Roads in the City of Lilongwe” is underway to facilitate traffic in the capital city.

<Health>

- Since 2011, JICA has continuously supported the introduction and dissemination of 5S-KAIZEN-TQM; in January 2016, a Quality Management Unit was established within the Ministry of Health; and in December 2016, the Unit was upgraded to the Quality Management Bureau. From FY2023, the individual expert “Promotion of Dissemination of Quality Improvement of Health Services through 5S-KAIZEN-TQM in Africa Region” is scheduled to be implemented.

(2) Status of cooperation and assistance coordination by other donors

According to OECD-DAC, donor support in FY2021 was USD 308 million by the United States, followed by the International Development Association with USD 188 million and the Global Fund with USD 177 million, while Japan ranked 10th with USD 24 million⁶⁹. As a framework for inter-donor coordination, meetings by Heads of Cooperations (HOCs) are held on a regular basis. In addition, regular sectoral donor meetings are held in the agriculture, infrastructure (power and transportation), education, and water sectors, in which JICA also participates.

a meeting between the President of Malawi and the Mayor of Yokohama at TICAD 5 in 2013, the city has dispatched experts and cooperation volunteer team members since then.

⁶⁹[Workbook: OECD DAC Aid at a glance by recipient_new \(tableau.com\)](#)

China is a major creditor among the bilateral-donors, but has not provided significant assistance in areas other than roads.

(3) Significance of cooperation by Japan and JICA

- Contribution to “human security”: Malawi is one of the poorest countries in Sub-Saharan Africa, and supporting Malawi’s growth is important in achieving the SDGs’ goal of “leaving no one behind.”
- Contribution to the international order based on the fundamental values of democracy: Malawi is a country with high expectations for deepening democracy, as it has achieved a peaceful change of government since independence, among other things. Cooperating with Malawi’s stable growth and strengthening bilateral cooperation will contribute to the establishment of an international order based on the fundamental values of democracy.
- Contribution to the entry of Japanese companies and promotion of their investment in Malawi: Malawi is located at the center of the Nacala Corridor, an important logistics route in the southern African region, and has the potential for increased activities by Japanese companies in the future, such as the recent discovery of deposits of rare metals (rutile, neodymium, etc.)⁷⁰. However, Malawi’s weak infrastructure and legal system have hindered the activities of private companies, and supporting the development of Malawi’s growth infrastructure through ODA will also contribute to the promotion of Japanese companies’ entry into the country.

(4) Future focus areas and cooperation programs

Up to now, JICA has been developing projects based on the three pillars of “Promotion of Agricultural Industrialization,” “Human Resources Development for Self-Sustaining Growth,” and “Development of Infrastructure for Growth with Climate Change and Urbanization in Mind” in accordance with the priority areas (medium-term objectives) of the “Country Development Cooperation Policy for the Republic of Malawi” (2018). In the future, while maintaining the axis of “developing a foundation for Malawi’s self-sustaining economic growth,” JICA assumes development of cooperation in the two main areas of “industrial development and infrastructure improvement” and “improvement of basic social services,” aiming at the formulation of more strategic projects.

The main changes in programming are as follows:

- ① The two priority areas of “Promotion of Agricultural Industrialization” and “Development of Infrastructure for Growth with Climate Change and Urbanization in Mind” will be

⁷⁰ Rutile is a mineral from which titanium is derived, and titanium is used primarily as a pigment. Neodymium is used in permanent magnets and is utilized as a component in electronic devices. In Malawi, exploration mining is in the beginning stages, mainly by Australian companies.

merged into a single priority area of “Industrial Development and Infrastructure Development,” under which two programs, “Industrial Development” and “Infrastructure Development” will be established.

- ② The sanitation sector will be newly incorporated into the program with a view to addressing waterborne diseases such as cholera, which are regularly prevalent due to cyclone damage and other factors. In this case, the program will be established as “Health and Sanitation” together with the health sector that has been classified as “Others.”
- ③ The “Sustainable Natural Resources Management” program, which is currently included in Priority Area 3, is an important global issue, but will not be programmed separately due to large-scale support by other donors and in consideration of the perspective of selection and concentration.

[So far]

Basic Policy: Building a Foundation for Sustainable, Self-Sustaining Growth	
Focus Areas	Cooperation Programs
1. Promotion of Agricultural Industrialization	Agricultural development
2. Human Resources Development for Self-Sustaining Growth	Improving the quality of education/learning
	Government Core Human Resources Development
3. Development of Infrastructure for Growth with Climate Change and Urbanization in Mind	Sustainable Natural Resources Management
	Water Resources Management and Water Supply Improvement
	Urban Infrastructure Development
4. Others	Health



[In the future]

Basic Policy: Creating a foundation that encourages people to break themselves free from poverty and achieve economic independence		
Focus Areas	Cooperation Programs	Corresponding JGA Cluster
1. Industrial development and economic infrastructure development	Agricultural/Industrial Development	<ul style="list-style-type: none"> • Entrepreneur and enterprise development • CARD (Coalition for African Rice Development) • Food Value Chain (FVC) Construction
	Economic Infrastructure Development	<ul style="list-style-type: none"> • Building a global network • Improved access to electricity • Reinforcement of power transmission and distribution networks • Capacity Building of Water Utilities
2. Improvement of basic social	Health and Sanitation	<ul style="list-style-type: none"> • Strengthening diagnosis and treatment at core hospitals

services		<ul style="list-style-type: none"> • Reinforcement of infectious disease control and Laboratory centers • Integrated Water Resource Management to solve the Water Issue in Local Area
	Improvement of the quality of learning	<ul style="list-style-type: none"> • Improvement of learning centered on development of textbooks and teaching materials • Enhancement of Education through Community-wide Collaboration

(5) Direction of JICA cooperation

The development issues that should be addressed as priority areas in the future are as follows:

① Industrial development and economic infrastructure development [SDG Goals 1, 6, 7, 8, 9]

<Agricultural and Industrial Development> As MW2063 calls for the improvement of productivity and commercialization of agriculture, JICA will aim at improving cultivation techniques and increasing productivity through technical and financial cooperation in irrigation development, first in the field of rice cultivation, where JICA has already provided assistance. In addition, JICA will support the commercialization of agriculture through the promotion of agribusiness.

This program promotes entrepreneur and enterprise development (“Africa Kaizen Initiative” and “Support for private entrepreneurs to create business innovation (NINJA) (Next INnovation with JApan”) under “4. Private Sector Development” of JICA’s Global Agenda (JGA), and promotion of regional rice cultivation in Africa (CARD: Coalition for African Rice Development) and food value chain (FVC) development under “5. Agricultural and Rural Development.”

<Economic Infrastructure Development> Support will be provided for the development of infrastructure indispensable for economic activities and the strengthening of management systems. Specifically, the project will be implemented for the electric power sector, which has a high need for cooperation with an electrification rate of 14.2%; the transportation sector, which contributes to the development of the Nacala Corridor as proposed in TICAD 8; and the water sector, which contributes to the stable supply of safe and secure water.

This program promotes the cluster for building a global network in JICA Global Agenda (JGA) “2. Transportation; the cluster for improving access to electricity and strengthening transmission and distribution networks in “3. Energy and Mining”; and promoting support for growth of water utilities in “19. Sustainable Water Resources Management and Water Supply.”

② Improvement of basic social services [SDG Goals 3, 4, 6].

<Health> In the area of health, where donor interventions are competing with each other, Japan will utilize wide-area cooperation to establish the 5S-KAIZEN-TQM method, which Japan has been working to disseminate. In the area of sanitation, efforts will be made to improve the sanitation environment, keeping in mind countermeasures against waterborne diseases such as cholera, which occur in the country regularly. Since sanitation is an issue deeply related to health, the implementation of cooperation that also contributes to the health sector will be considered in the mid- to long-term.

This program promotes practical integrated water resource management to solve local water problems in JICA Global Agenda (JGA) “6. Health,” including strengthening core hospital diagnosis and treatment and strengthening infectious disease control and centers, and “19. Sustainable Water Resources Management and Water Supply.”

<Education> JICA had mainly cooperated in teacher training and teacher capacity building with the aim of improving the quality of secondary education. But as mentioned above, improvement of the quality and internal efficiency of education has become an urgent issue as well. Utilizing previous cooperation assets, JICA implements the activity on Enhancement of Primary Education through Community-Wide Collaboration.

This program promotes the improvement of learning and improvement of community-collaboration type education through the development of textbooks and teaching materials of the JICA Global Agenda (JGA) “8. Education.”

Based on the results of the ODA country evaluation⁷¹ conducted in FY2021, JICA will implement cooperation with an eye to utilizing the network of Japan Overseas Cooperation Volunteers (JOCV) alumni, returned training participants, and others. In addition, cooperation will be conducted from the perspectives of gender and climate change as cross-cutting issues.

⁷¹ [100342602.pdf \(mofa.go.jp\)](#)

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