SAMOA STRATEGIC EVALUATION: PHASE 2

Final Report

Photo: Saletoga Sands Resort and Spa, Samoa by Fine Fifita

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Glossary

Acronym	Name
4YP	Four Year Plan
ACC	Aid Coordination Committee
ADB	Asian Development Bank
BLP	Business Link Pacific
CHOGM	Commonwealth Heads of Government Meeting
COVID–19	Coronavirus disease of 2019
EU	European Union
GDP	Gross Domestic Product
GEDSI	Gender equality, disability and social inclusion
GFA	Grant Funding Arrangement
GoS	Government of Samoa
ICESD	International Cooperation for Effective Sustainable Development
IDC	International Development Cooperation
JID	Johnstaff International Development
JPAM	Joint Policy Action Matrix
KEQ	Key Evaluation Question
MAF	Samoa Ministry of Agriculture and Fisheries
MCIL	Samoa Ministry of Commerce, Industry and Labour
MDF	Market Development Facility
MERL	Monitoring, Evaluation, Research and Learning
MFAT	New Zealand Ministry of Foreign Affairs and Trade
MO	Medium–term Outcome
MOF	Samoa Ministry of Finance
NEET	Youth not in education, employment or training
NGO	Non–governmental organisation
NZD	New Zealand Dollars

Acronym	Name
ODA	Official Development Assistance
OECD DAC	OECD Development Assistance Committee
PACER Plus	Pacific Agreement on Closer Economic Relations
PALM	Pacific Australia Labour Mobility scheme
PDC	Pacific Development Cooperation
PHAMA Plus	Pacific Horticultural and Agricultural Market Access
PSDP	Private Sector Development Programme
RSE	Recognised Seasonal Employer scheme
SBS	Samoa Bureau of Statistics
SBH	Samoa Business Hub
SCCI	Samoa Chamber of Commerce and Industry
SIDS	Small Island Developing States
SKIA	Samoa Koko Industry Association
SPC	The Pacific Community
STEC	Samoa Trust Estates Corporation
STO	Short–term Outcome
SWAG	Samoa Women's Association of Growers
USD	US Dollars
WST	Samoan Tala

1. Executive summary

New Zealand has provided NZD257 million in international development cooperation (IDC) support to Samoa over the period 2018–2024 as a strong demonstration of its commitment to partnering with the Pacific and with Samoa and its unique and longstanding relationship with the country. This support, referred to as the Samoa Programme, was delivered through 215 separate activities across a number of themes and sectors.

New Zealand's Ministry of Foreign Affairs and Trade (MFAT) commissioned Johnstaff International Development (JID) in partnership with Sustineo to conduct a strategic evaluation of the Samoa Programme covering this period. The evaluation focused on the Programme's relevance, effectiveness, efficiency and lessons learned. The evaluation included a field mission to Samoa, consultations with stakeholders in Samoa and New Zealand and review of extensive Programme and activity documentation and data. The evaluation considered both the Programme overall, and four areas of focus – budget support, support for the 2024 Commonwealth Heads of Government Meeting (CHOGM), cocoa agriculture development and private sector development.

Key findings

The Samoa Programme is based on a strong partnership between Samoa and New Zealand and was closely aligned with Samoa's national plans and priorities. The Programme activities directly addressed Samoa's needs and have responded to changing and emerging priorities such as the Corona virus Disease of 2019 (COVID–19) recovery, climate change and security. The Programme used a range of funding modalities that were appropriate to each context and ensured that the delivery of activities was effective and efficient.

The Programme has been successful in delivering support where it was needed – in strengthening Samoa's institutions and enabling environment, in developing health and education and other sectors, in developing the capacity of individuals and organisations and in responding to emergencies. Samoa has performed well on key national indicators such as Gross Domestic Product (GDP) and employment growth and the Programme has contributed to this.

The Programme was guided by New Zealand's annual country plans and the Samoa Four Year Plan (4YP) which were developed in the context of Samoa's national planning framework to ensure close alignment and relevance to Samoa's development needs and priorities. The 4YP identified goals and short–and medium–term outcomes for the Programme to guide the delivery of activities. While activities addressed and reported against these outcomes, the process for measuring and documenting the outcomes can be improved, particularly in aggregating activity results to measure the achievements of the Programme.

The Programme was delivered through a large number of separate activities which provided broad coverage across thematic and sector needs, although in some cases activity delivery could have adopted a more strategic and programmatic approach to support – consolidating activities under a single programme where appropriate and feasible – to strengthen the overall impact and effectiveness of delivery.

A key strength of the Programme was locally–led development, although the use of local agencies and organisations resulted in some implementation challenges due to capacity constraints and this will require a stronger focus on institutional strengthening for delivery partners in the design and delivery of future activities.

Budget support is Samoa's preferred modality and was used effectively in the Programme for emergency relief, reform of the enabling environment and for sector development. There is scope to expand its use in sector development, increase technical assistance and strengthen engagement by Post to support the reform agenda and sector development priorities.

New Zealand's support for CHOGM 2024 was highly successful and resulted in benefits beyond Samoa's immediate need for assistance with security–related services for the event. The role and contribution of New

Zealand agencies were valuable and built on existing links between Samoan and New Zealand counterpart agencies, which can be leveraged for future development activities.

List of recommendations

Recommendation 1

Consider improving activity documentation and reporting to enable the measurement of activity alignment to Samoa Country Plan goals and outcomes.

Recommendation 2

Consider improving activity documentation and reporting to enable the measurement of activity alignment to priority themes particularly interconnected and cross–cutting themes such as gender equality, disability and social inclusion (GEDSI) and climate change.

Recommendation 3

Consider developing an overarching monitoring, evaluation, research and learning (MERL) framework or guidance for the Samoa Country Plan that ensures consistency in the specification of outputs and short–term outcomes and supports aggregation of results including cross–cutting themes such as GEDSI and climate change.

Recommendation 4

Pursue opportunities in future programming to use a strategic or programmatic approach instead of individual projects, where feasible and appropriate, including in cocoa agriculture and private sector development investments.

Recommendation 5

Ensure that future activity designs provide resources for institutional strengthening and capacity development for local implementation partners.

Recommendation 6

Explore opportunities to expand use of budget support for sector development using appropriate arrangements to support implementation, monitoring and performance reporting.

Recommendation 7

Consider providing additional technical assistance with budget support to enable institutional strengthening and capacity development to support reform progress and implementation of sector development.

Recommendation 8

Take advantage of opportunities for Post to optimise its engagement with Samoa on its budget support investments, particularly in relation to the Joint Policy Action Matrix (JPAM).

Recommendation 9

Document and draw together past and planned NZ Inc security–related agency engagement with Samoa counterparts as part of long–term agency and sector planning for institutional strengthening and capacity building to inform the Samoa Country Plan.

Recommendation 10

Capture and codify the lessons learned from CHOGM support to develop and document a model for mobilising NZ Inc capabilities to meet event–specific and programmatic counterpart agency needs.

2. Background, purpose and methodology

2.1 Background

The Samoa Programme funded activities to support Samoa's development goals across a range of areas and was guided by MFAT's Samoa Four Year Plan (December 2021). As the Samoa Programme was last evaluated in 2015, MFAT required a strategic (whole–of–programme) independent evaluation of the Programme and to inform implementation of the new Samoa Country Plan.

The evaluation was undertaken in two phases due to Samoa's hosting of CHOGM in late 2024. Phase 1 focused on scoping and planning the evaluation and included initial consultations and desk review. The output of Phase 1 clarified and confirmed the approach to implementing the evaluation. Phase 2 focused on implementing the full evaluation in terms of detailed data collection, consultation and analysis in relation to both overall and specific elements of the Programme. MFAT has engaged JID, working in partnership with Sustineo, to undertake Phase 1 and Phase 2 of the evaluation.

2.2 Purpose of the evaluation

The purpose of this evaluation was both formative and summative. As a **formative evaluation,** it may inform the future management of the Programme by identifying lessons learned, particularly in terms of aspects of the Programme that worked well and areas that need to be improved. As a **summative evaluation**, it seeks to assess the Programme's achievement of its intended results.

2.3 Methodology

The evaluation criteria and questions provided guidance on the development and implementation of the evaluation. The key evaluation questions (KEQs) were developed from the evaluation Terms of Reference and refined through discussions with MFAT. Table 1 provide the detail of the KEQs and sub–questions and maps each to relevant evaluation criteria, based on OECD Development Assistance Committee (DAC) criteria and New Zealand's International Cooperation for Effective Sustainable Development (ICESD) Policy Statement.

While the evaluation focus was on the period 2018–2024 and the evaluation criteria and questions were related to the 4YP, there are opportunities for future–focused learnings that may inform the implementation of the 2025–2028 Samoa Country Plan, and this was reflected in the evaluation questions.

Table 1 – Evaluation criteria and questions

Criteria	Key Evaluation Questions	
Relevance	**KEQ 1.**	**To what extent did the design and delivery of the Samoa Programme meet Samoa's development needs and align with strategic documents including the Samoa Four Year Plan 2018–2024?**
	KEQ 1.1	To what extent was the Samoa Programme relevant to and aligned with Samoa's context, development plans and priorities, policies and capabilities? To what extent was the Samoa Programme aligned with the foreign policies and priorities of Samoa and New Zealand, including the Samoa 4YP 2018–2024?

Criteria	Key Evaluation Questions	
	KEQ 1.2	To what extent were the activities funded and delivered through the Samoa Programme compatible with each other and with other activities funded and delivered by New Zealand (internal compatibility)? To what extent were the activities funded and delivered through the Samoa Programme compatible with activities funded and delivered by other development partners (external compatibility)? How was this compatibility and coordination perceived by other development partners?
Effectiveness	**KEQ 2.**	**How successful has the Samoa Programme been in achieving its intended results?**
	KEQ 2.1	To what extent has the Samoa Programme achieved its intended short– to medium–term results (outputs and outcomes)? Have the Programme's delivery modalities been effective? How effective has the Programme been in partnering with in–country leaders and is there evidence of a deepened bilateral relationship from 2018–2024? How effective has the Programme been in partnering with international and domestic non–government organisations (NGOs)
Impact	KEQ 2.2	How has the Samoa Programme contributed to long–term results (impacts) for Samoa?
Sustainability	KEQ 2.3	To what extent will the benefits of the Samoa Programme continue, or be likely to continue, without continued support by New Zealand over the medium– to long–term?
ICESD Quality Standards	KEQ 2.4	To what extent has the delivery and approach of the Samoa Programme been consistent with the quality standards in New Zealand's ICESD policy statement (effective, inclusive, resilient and sustained)?
Efficiency	**KEQ 3.**	**How well have the Samoa Programme human, financial and other resources been used, particularly in relation to cost, operational and time efficiency?**
	KEQ 3.1	To what extent did the Programme use the right (most efficient) modalities for both Samoa and New Zealand to deliver the Programme?
	KEQ 3.2	How flexible was the Programme in pivoting in response to COVID–19?
	KEQ 3.3	What has been the impact of capacity constraints and other challenges on the delivery of the Samoa Programme on all parties, particularly MFAT?
All	**KEQ 4.**	**What are the key learnings and areas of improvement that can inform ongoing management and outcomes of the Programme, and its future development (shape)?**
	KEQ 4.1	How well–aligned and well–positioned is the Programme to achieve the planned outcomes of the 2024–2027 Samoa Country Plan?

A mixed–method approach was used for the collection and analysis of data and information, guided by the evaluation questions, using both qualitative and quantitative techniques. This included:

- analysis of relevant secondary documentation including strategic and policy documents and country– and activity–level documentation and reports

- consultation with key stakeholders during a field mission to Samoa and through remote consultations in Samoa and New Zealand (see Appendix G)
- a sense–making workshop with Post and Desk MFAT staff
- collation and analysis of national–level statistical information in relation to 4YP indicators.

The 4YP identified indicators linked to each of the 4YP's three strategic goals include published national–level statistics which are shown in Table 2.

Table 2 – 4YP indicators and data sources

Strategic goal	Indicator	Sources
1. Resilience	Annual growth rate of real GDP per capita and per sector (e.g. tourism)	The Samoa Bureau of Statistics (SBS) publishes the quarterly GDP reports While the published GDP reports include GDP by sector, they are broad and do not include tourism as an explicit sector
	Unemployment rates for youth and women	The SBS Labour Force and Child Labour Survey 2017 and 2022 includes statistics on unemployment rates by age and gender
	Income inequality	The SBS Household Income and Expenditure Survey 2018 and 2022 includes two specific measures of income inequality –the Gini index and Quintile ratio Note – the results for the 2022 HIES have not yet been published
	Continued high rankings on World Bank Worldwide Governance Indicators	The World Bank publishes percentile ranks for six indicators for each year to 2023) https://www.worldbank.org/en/publication/worldwide–governance–indicators/interactive–data–access
	Growth in Samoa's digital economy and increased economic connectivity	The Pacific Community (SPC) publishes UN e–Government national indicators on its Pacific Data Hub SPC publishes several Digital Development indicators (on digital access and utilisation) on its Pacific Data Hub
2. Well–being	Proportion of youth (aged 15–24 years) not in education, employment or training	The SBS Labour Force and Child Labour Survey 2017 and 2022 includes statistics on this indicator
	Promotion of primary healthcare services contributing to a reduction in incidence of Non–Communicable Diseases	
	Demonstrated effective policy engagement to support quality education and health service delivery	

Strategic goal	Indicator	Sources
3. Security	Mutual feedback on the quality of partnership shared during formal bilateral and regional consultations, and through review of cooperation activities	
	Demonstrated effective interagency collaboration and coordination on areas of shared security interest such as transnational crime, movement of people and cyber security	
	Climate change resilience integrated effectively into policy implementation across sectors	

3. The Samoa Programme and context

This section includes information on the country context, focus of the Samoa Programme and the activities delivered under the Samoa Programme.

3.1 Country context

Samoa is an independent country with a population of around 225,000 people. Its economy is heavily reliant on income from tourism, remittances and foreign grants. SBS data shows that Samoa's GDP for the year ending June 2024 was WST2.94 billion or NZD1.82 billion (at constant prices), which is an increase of 14.9% on the previous year, and the third year of growth in GDP since the pre–COVID peak of WST2.23 billion for the year ending June 2019. The significant fall in GDP reflects disease impacts (including COVID–19 and measles) on an economy heavily reliant on tourism income. With a young population (50% of the population are under the age of 25), limited formal employment opportunities present a major challenge for economic and social development, and Samoa is vulnerable to climate change impacts and natural disasters.

New Zealand has a strong partnership with Samoa, based on deep family and cultural links, two–way trade and a shared interest in supporting Pacific regionalism and Samoa's role in providing leadership to the region. Samoa and New Zealand are signatories to the Pacific Agreement on Closer Economic Relations (PACER) Plus and Samoa also hosts the PACER Plus Implementation Unit as well as the Pacific Regional Environment Programme, the Pacific Transnational Crime Unit and several UN sub–regional offices.

In New Zealand's 2023 census, 213,069[1] people identified as ethnic Samoan (out of 442,632 people with Pacific ethnicity) which is an increase from 182,721[2] in the 2018 census. In addition, Samoan workers regularly participate in the New Zealand seasonal worker programme, with 3,334 Samoan workers arriving in 2021–2022[3], compared to 9,423 from all countries, while Vanuatu had the highest number of arrivals (4,983).

Based on OECD figures[4], in 2023 Samoa received a total of USD115.4m in multilateral and bilateral Official Development Assistance (ODA). New Zealand's contribution of USD39.9m (34.5%) was the second largest contribution after Australia (USD43.9m).

New Zealand is a significant trading partner, with a total two–way trade in 2024 of NZD506 million[5]. This included NZD290 million in exports to Samoa and NZD216 million in imports from Samoa, with travel representing a significant proportion of each.

The partnership between New Zealand and Samoa has been formalised in the 1962 Treaty of Friendship and the Statement of Partnership 2024–28 (which updates the first statement signed in 2019). The statement identified five priority areas for cooperation – partnership, security, empowering communities, building climate resilience and inspiring growth, as well as principles guiding the partnership and shared understandings about the approach to cooperation.

New Zealand's IDC with Samoa is provided across a range of areas and the support provided during the evaluation period was guided by New Zealand's annual country plans and the Samoa 4YP, which were aligned with Samoa's

[1] https://tools.summaries.stats.govt.nz/ethnic–group/

[2] StatsNZ 2018 Census ethnic group summary https://www.stats.govt.nz/tools/2018–census–ethnic–group–summaries/samoan

[3] New Zealand Immigration RSE arrivals https://www.immigration.govt.nz/documents/statistics/statistics–rse–arrivals.pdf

[4] OECD Aid at a glance charts https://www.oecd.org/dac/financing–sustainable–development/development–finance–data/aid–at–a–glance.htm

[5] StatsNZ New Zealand trade dashboard – https://statisticsnz.shinyapps.io/trade_dashboard/

development priorities. With its heavy reliance on tourism income, COVID–19 has had significant impacts on Samoa's economy and supporting Samoa's recovery was an additional focus of recent IDC support, as was building climate change resilience.

3.2 Evaluation focus

The focus of the evaluation is the Samoa Programme, which includes activities supported by funding to Samoa under the Pacific Development Cooperation (PDC) component of New Zealand's IDC budget. It is noted that Samoa was a beneficiary of other activities supported by IDC funding, for example funding directed to regional bodies, multinationals and other categories of IDC funding. These related activities have not been included in this evaluation.

Programme strategy and planning

The Samoa 4YP developed in 2021, and previous annual country plans, provided the strategic direction for the Programme and was complemented by high–level consultations between New Zealand and Samoa that guide investment decisions. The 4YP was informed by Samoa's development strategy – Pathway for the Development of Samoa 2021/22 – 2025/26 and the previous national plan, as well as New Zealand's strategic priorities. Future investment decisions will be guided by New Zealand's 2025 four–year Samoa Country Plan.

The 4YP's Strategic Goals were:

1. Strengthen Samoa's economic and institutional resilience
2. Support an inclusive Samoa in which all Samoans reach their full potential through enhanced well–being (hauora)
3. Build a secure Samoa, founded on strong partnership and collective action for long term regional security

The 4YP included a logic diagram which specified the 4YP's short– and medium–term outcomes and strategic goals and is included in Appendix A. The 4YP identified performance indicators for each goal, which can be used to monitor the 4YP's results using country–owned statistics to provide a country–level assessment of the results of the 4YP. Progress against the 4YP was also the focus of shared annual reflection discussions.

3.3 Funding period

The evaluation focused on the period 2018–2024 and covered both the 2018–2021 funding triennium and the 2021–2024 funding triennium. This period is associated with a significant increase in overall IDC funding aligned with New Zealand's stronger focus on the Pacific region (the Pacific Reset) and support for challenges faced by the region including COVID–19 recovery and climate change.

The funding context for the Samoa Programme during the evaluation period is summarised in the sections below.

Total IDC funding

The triennial funding for all IDC activities increased from NZD1.72 billion to NZD2.22 billion for the 2018–2021 triennium (an increase of 29.1%) and to NZD3.2 billion for the 2021–2024 triennium (an increase of 44.1%). The amounts and percentage increases are shown in Appendix B.

Over the period, the IDC funded activities in several categories including:

- Pacific Development Cooperation (direct bilateral funding to Pacific countries and regional activities)
- Global Development Cooperation

- Multilateral Agencies and Partnerships (including NGOs that work in the Pacific region)
- Humanitarian Assistance.

Annual IDC funding in 2023–2024 was NZD1.2018 billion, and just under 60% was allocated to PDC for funding to individual countries as well as regional funding. IDC funding for PDC was NZD757.7 million in 2023–2024 compared to NZD422.9 million in 2018–2019, which represents an increase of 79.2% over the evaluation period. Details of the expenditure against each IDC category during the evaluation period are provided in Appendix C.

IDC funding for Samoa

Annual expenditure directed to Samoa as part of PDC has represented between 5.3% and 9.8% of total expenditure for Pacific countries over the evaluation period and was NZD66.6 million in 2023–2024, compared to NZD27.9 million in 2018–2019. This represents an increase in PDC expenditure for Samoa of 138.7% over the evaluation period compared to an increase of 77.9% in total PDC expenditure during this time. Note these expenditure breakdowns, as reported in MFAT Annual Reports, are larger than the reported PDC funding discussed in the previous section. Table 3 shows the annual Samoa expenditure in relation to the total PDC expenditure in each year of the evaluation period. Over the period 2018–2024, the total Samoa Programme expenditure of NZD257 million represented 8.0% of total PDC expenditure for the period. Details of the funding provided to all Pacific countries during the evaluation period are provided in Appendix D.

Table 3 – Samoa's share of Pacific Region IDC expenditure

Country / Region	2018–19 NZDm	2019–20 NZDm	2020–21 NZDm	2021–22 NZDm	2022–23 NZDm	2023–24 NZDm	Total Change %
Samoa Allocation	27.9	34.7	26.1	46.3	55.5	66.6	138.7
% of Total	6.6	7.8	5.3	8.4	9.8	8.8	
Total Funding	**422.9**	**446.9**	**489.7**	**550.2**	**567.4**	**752.7**	**77.9**

Source: MFAT Annual Reports

Programme activities

The activities funded under the Samoa Programme represented considerable diversity in terms of thematic focus and funding. In addition, activities were either implemented as an activity delivered to Samoa only, or an activity delivered to Samoa as part of a multi–country regional activity.

During the evaluation period, 215 separate activities were funded under the Samoa Programme across a range of areas, and MFAT categorises these activities against the OECD DAC sectors as well as themes and sub–themes. The expenditure over the evaluation period was NZD257.8 million. It should be noted that these activities include some related to subsequent stages of an activity or are allocated to two, three or four separate sub–themes. The spread of activities by number and total planned value across the themes is shown in Appendix E and the spread of activities by expenditure is shown in Appendix F.

The theme covered by the largest **number of activities** was Education with 57 activities (26.5%), followed by Health with 50 activities (23.3%). The theme with the largest **expenditure** was Economics at NZD102.7 million (39.8% of total value), followed by Education at NZD161.1 million (23.3%). While the Economics theme had the largest total value, the number of activities (24 or 11.2%) was quite low relative to its value, which reflects its focus on the use of higher order modalities, including budget support to fund economic reform.

The value of the activities ranged from NZD1,344 to NZD30.8 million, with an average value of NZD1.2 million. There were 9 activities with a value of NZD10 million or more (4.2% of activities) while there were 180 activities with a value of NZD1 million or less (83.7%). Just over 71.2% of activities had a value of NZD500,000 or less. The spread of activities across value ranges is shown in Appendix G.

There were 79 activities (36.6%) delivered as part of multi–country programmes in the region.

Activities in priority areas

As a country–level evaluation and with 215 activities it is not feasible to assess the results of all activities, and the evaluation necessarily focuses on activities in priority areas. These priority areas are:

- Budget support
- Private sector development
- Cocoa agriculture
- Support for CHOGM.

The rationale for the selection of the priority areas included:

- the activities in these areas were long–running activities that have not yet been examined in depth
- measurement of the short– and medium–term outcomes and impacts of these activities will assist in decision–making for the next triennium
- the Cocoa Agriculture activities have ended and their results need to be measured as part of the finalisation process
- CHOGM was a significant undertaking for Samoa, and the Programme support was an important supplement to Samoa's capability.

Although the Education theme was one of the largest by number of activities and total value, it is not a priority focus of this evaluation as the Education theme has been evaluated separately. The specific activities that were a priority focus of the evaluation are listed in Table 4.

Table 4 – Activities in priority areas

Priority Area	Activity	Expenditure NZDm
Budget Support	Incentivising Economic Reform 2018–2021	10.0
	Supporting Economic Reform 2021–2024	21.0
	Samoa Emergency Budget Support 2022–2023	24.0
Private Sector	Private Sector Development Programme	7.6
	Business Link Pacific Phase I	1.7
	Business Link Pacific Phase II	0.8
	Market Development Facility	1.2

Priority Area	Activity	Expenditure NZDm
Cocoa Agriculture	Improved Livelihoods Cocoa Samoa	0.9
	Samoa Cocoa industry Development Initiative	3.9
	Samoa Cocoa Export Improvement Programme	0.1
CHOGM 2024 Support	Samoa CHOGM 2024 Support	11.9

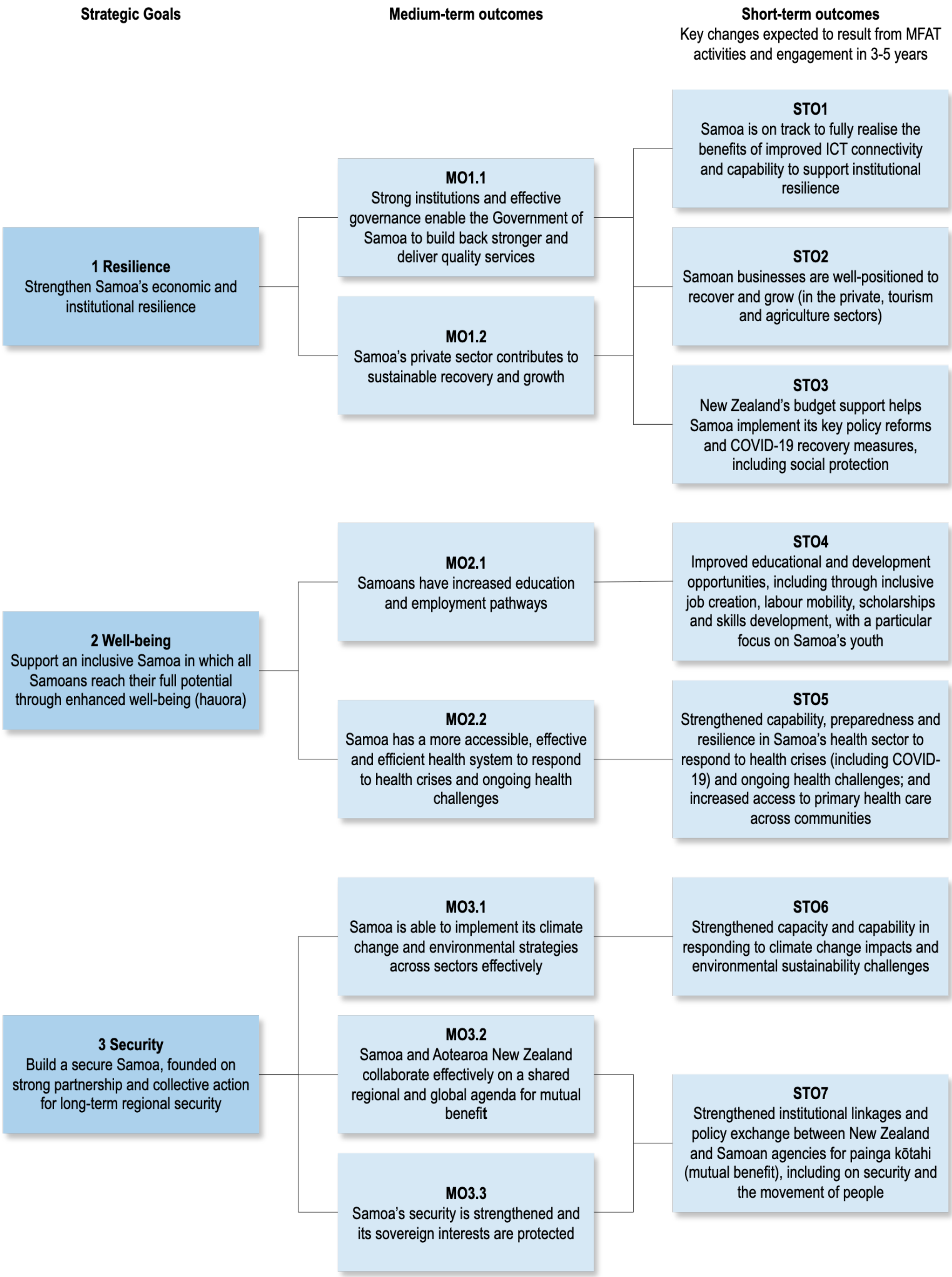
Activities in non–priority areas

Activities in non–priority areas for this evaluation have not been assessed specifically or in detail. Whereas the activities in the priority areas were subject to a 'deep dive', the non–priority activities were assessed in aggregate and in broader consideration of the Programme in general.

Alignment of activities with the Four Year Plan

Programme activities were aligned with the goals and outcomes of the 4YP which are shown in the 4YP logic diagram attached in Appendix A. The logic diagram shown in Figure 1 is presented in a different form to illustrate the relationship between the 4YP's goals and outcomes more clearly.

Figure 1 – Modified logic diagram for the Samoa 4YP (December 2021)



Source: Adapted from the logic diagram presented in the Samoa 4YP

The priority activities have been mapped against these goals and outcomes in Table 5 below, based on the alignment identified in activity documentation. It should be noted that some activities addressed multiple goals and outcomes in the 4YP.

Table 5 – 4YP Plan strategic goals, outcomes and priority activities

Strategic goals and outcomes		Activities
Strategic goal **Resilience**	1 Strengthen Samoa's economic and institutional resilience	Samoa CHOGM 2024 Support
Medium–term outcome	1.1 Strong institutions and effective governance enable the Government of Samoa to build back stronger and deliver quality services	Incentivising Economic Reform 2018–2021[6] Supporting Economic Reform 2021–2024 Samoa Emergency Budget Support 2022–2023
Short–term outcome	1 Samoa is on track to fully realise the benefits of improved ICT connectivity and capability to support institutional resilience	
Medium–term outcome	1.2 Samoa's private sector contributes to sustainable economic recovery and growth	
Short–term outcome	2 Samoan businesses are well positioned to recover and grow (in the private, tourism, and agriculture sectors)	Private Sector Development Programme Business Link Pacific I Business Link Pacific II Samoa Cocoa Industry Development Initiative Improved Livelihoods Cocoa Samoa[7] Samoa Cocoa Export Improvement Programme[6]
Short–term outcome	3 New Zealand's budget support helps Samoa implement its key policy reforms and COVID–19 recovery measures, including social protection	Incentivising Economic Reform 2018–2021[6] Supporting Economic Reform 2021–2024 Samoa Emergency Budget Support 2022–23
Strategic goal **Well–being**	2 Support an inclusive Samoa in which all Samoans reach their full potential through enhanced well–being (hauora)	Incentivising Economic Reform 2018–2021[6] Supporting Economic Reform 2021–2024
Medium–term outcome	2.1 Samoans have increased education and employment pathways	
Short–term outcome	4 Improved educational and development opportunities, including through inclusive job creation, labour mobility, scholarships and skills development, with a particular focus on Samoa's youth	Business Link Pacific I

[6] As the activity was initiated prior to the 4YP, it has been categorised against the outcomes used for similar activities.

[7] As the documents reviewed reference outcomes not in the 4YP the activity it has been categorised against the equivalent outcome.

Strategic goals and outcomes		Activities
Medium–term outcome	2.2 Samoa has a more accessible, effective and efficient health system to respond to health crises and ongoing health challenges	
Short–term outcome	5 Strengthened capability, preparedness and resilience in Samoa's health sector to respond to health crises (including COVID–19) and ongoing health challenges; and increased access to primary health care across communities	
Strategic goal **Security**	3 Build a secure Samoa, founded on strong partnership and collective action for long–term regional security	Samoa CHOGM 2024 Support
Medium–term outcome	3.1 Samoa is able to implement its climate change and environmental strategies across sectors effectively	Incentivising Economic Reform 2018–2021[6] Supporting Economic Reform 2021–2024
Short–term outcome	6 Strengthened capacity and capability in responding to climate change impacts and environmental sustainability challenges	Business Link Pacific I Business Link Pacific II
Medium–term outcome	3.2 Samoa and Aotearoa New Zealand collaborate effectively on a shared regional and global agenda for mutual benefit	Incentivising Economic Reform 2018–2021 Supporting Economic Reform 2021–2024 Samoa CHOGM 2024 Support
	3.3 Samoa's security is strengthened and its sovereign interests are protected	Samoa CHOGM 2024 Support
Short–term outcome	7 Strengthened institutional linkages and policy exchange between New Zealand and Samoan agencies for painga kōtahi (mutual benefit), including on security and the movement of people	Samoa CHOGM 2024 Support

While the Emergency Budget Support activity identified links only to the first strategic goal, the two other budget support activities identified links to all three strategic goals. The links to the 4YP goals and outcomes for the Market Development Facility (MDF) have not yet been identified as activity documentation is not available.

4. Relevance

Key evaluation question

To what extent did the design and delivery of the Samoa Programme meet Samoa's development needs and align with strategic documents including the Samoa Four Year Plan 2018–2024?

Relevance relates to the alignment of the Samoa Programme with Samoa's development needs and priorities and includes its alignment with New Zealand's international development priorities for the Pacific and for Samoa.

4.1 Overall findings

Overall key findings

- The 4YP and Samoa Programme are well–aligned to Samoa's national development plans, which reflect Samoa's development context, needs and strategic priorities.
- The 4YP and Samoa Programme are well–aligned to New Zealand's international development policies and strategic priorities.
- The 4YP and Samoa Programme were developed and delivered in the context of strong arrangements that ensure the relevance of New Zealand's investment in Samoa, including a strong partnership between Samoa and New Zealand, a clear planning framework and coordination arrangements, regular dialogue on the progress and focus of the 4YP and responsiveness to Samoa's and New Zealand's changing strategic priorities.

The Samoa Programme has been developed and implemented in close partnership with Government of Samoa (GoS) agencies and through mechanisms and arrangements that ensure strong alignment of the programme with both GoS and NZ strategic priorities.

Government of Samoa strategic priorities

GoS priorities are determined through a clear framework that identifies priorities and outcomes which are reflected in cascading long– and medium–term national plans which in turn inform sector plans and district development plans. Planning is also informed by relevant global and regional commitments. Samoa's planning framework is encapsulated in the National Planning Framework which describes the development, governance and coordination of plans. The planning framework consists of the following components.

- global commitments – Sustainable Development Goals (SDGs)
- regional commitments – 2050 Strategy for the Blue Pacific Continent
- long–term national plan – Samoa 2040: Transforming Samoa to a Higher Growth Path
- medium–term national plan – Strategy for the Development of Samoa 2016–2020 and Pathway for the Development of Samoa 2021–2026
- national sector plans, which are 5– or 10–year plans to guide sector–wide (cross–agency) planning, implementation and reporting across 14 sectors
- district development plans (5–year plans) which reflect priorities identified by the villages that make up the district and implemented by the District Development Council.

Sector planning is guided by the Sector Planning Manual which identifies 14 sectors (Table 6).

Table 6 – Sector plans

Priority area	Sectors	Current plan
Economic	Finance	2023–2027
	Agriculture	2022–2027
	Trade, Commerce and Manufacturing	2024–2029
	Tourism	2022–2027
	Public Administration	2021–2025
Social	Health	2020–2030
	Education	2019–2024
	Law and Justice	2020–2025
	Community	2024–2028
Infrastructure	Water	2021–2025
	Transport	2023–2028
	Information and communication Technology	2023–2027
	Energy	2024–2028
Environment	Environment	2023–2027

In addition to the cascading plans, the planning framework includes the Aid Coordination Committee (ACC) mechanism which approves, allocates and coordinates ODA investments by donors and development partners. The ACC membership includes:

- the Prime Minister (Chair)
- Minister of Finance (Deputy Chair)
- CEO, Ministry of Foreign Affairs and Trade
- CEO, Ministry of Finance
- CEO, Ministry of the Prime Minister and Cabinet
- CEO, Public Service Commission.

The ACC plays an important role in ensuring that donor investments are aligned with Samoa's development needs and priorities, are appropriate and optimise coherence and harmonisation between donor programmes.

Government of New Zealand strategic priorities

New Zealand's strategic priorities for its investments in Samoa were encapsulated in annual country plans and from 2021 the Samoa 4YP. The priorities of the 4YP reflect New Zealand's strategic priorities for the Pacific, and were informed by key strategic policies and directions including:

- the Pacific Reset / Resilience approach
- the ICESD policy
- NZ MFAT strategic plans / strategic intentions
- specific IDC priorities for the Pacific.

From 2024, NZ MFAT developed specific IDC priorities for the Pacific, however prior to this NZ MFAT's strategic intentions included a specific Pacific strategic goal (see below), although MFAT's IDC investments were also addressed through other strategic goals.

2019–2024 Strategic Intentions

1. Strengthen, protect and use international rules and institutions to pursue New Zealand values and interests
2. Grow sustainable economic returns and resilience from trade, investment and other international connections
3. Embed New Zealand as an active and integral partner in building Asia–Pacific architecture in support of regional stability and economic integration
4. **Promote a stable, prosperous and resilient Pacific in which New Zealand's interests and influence are safeguarded**
5. Promote sustainable international solutions to global environment and natural resource challenges that impact on New Zealand
6. Lead New Zealand's international action to advance and protect New Zealanders' safety and New Zealand's security
7. Build and leverage targeted international relationships to achieve our goals

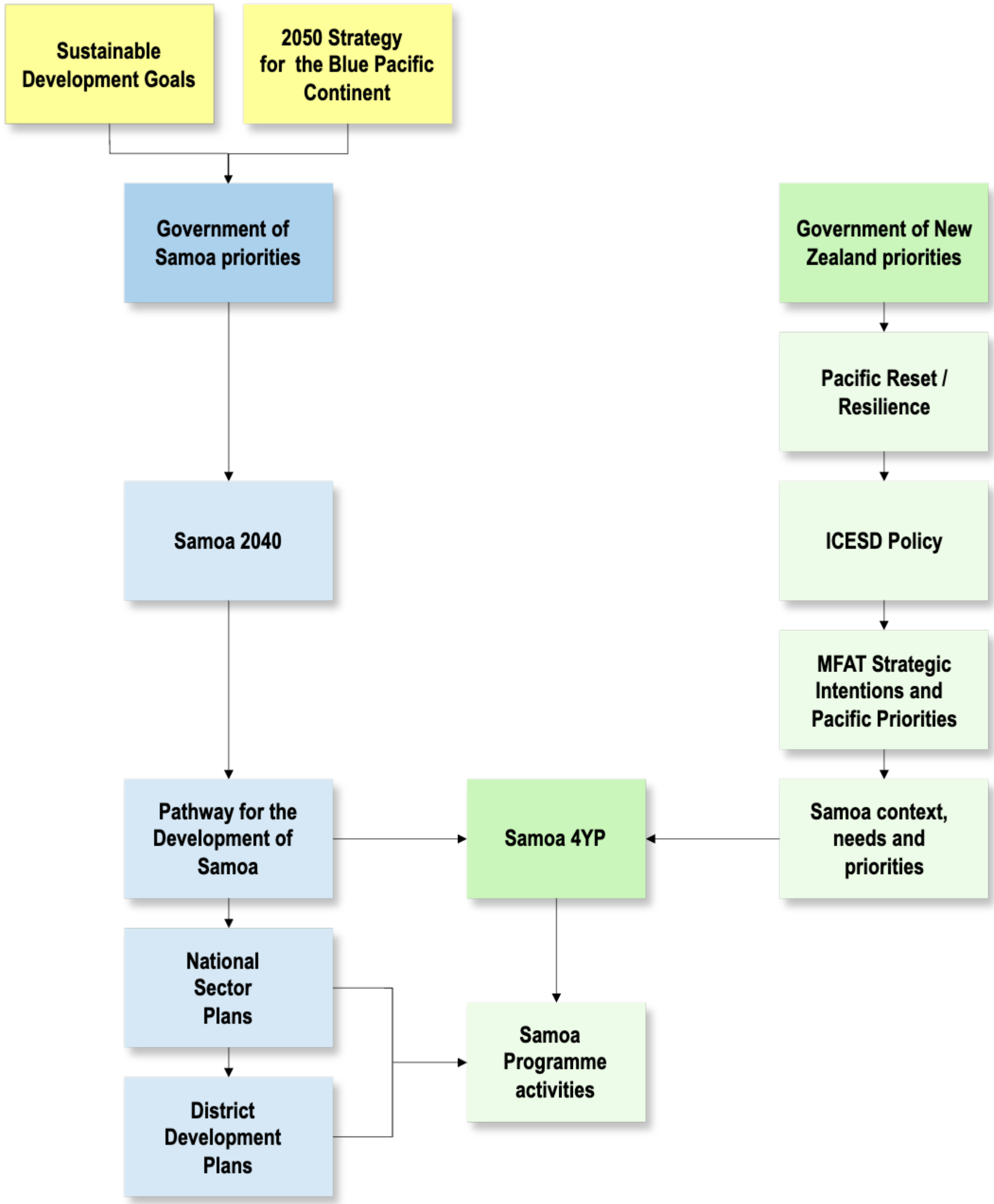
NZ MFAT Strategic Intentions 2019–2024

Broadly, the strategic goal of **a stable, prosperous and resilient Pacific** relates to economic and social resilience, peace and security, climate change resilience and environmental sustainability and builds on the Pacific Reset / Resilience and ICESD policies.

The Samoa Programme planning framework

The Samoa Programme was guided by the 4YP which reflects both Samoa's and New Zealand's priorities for Samoa's development. Figure 2 illustrates the contribution of both Samoa's and New Zealand's strategic thinking and planning to ensure that the Samoa Programme was aligned with and informed by the relevant strategic priorities and directions of both Samoa and New Zealand. The approach was supported by close engagement between the countries in developing the 4YP and well as annual high–level consultations to discuss progress and agree directions for subsequent years.

Figure 2 – Samoa Programme planning framework



Alignment between the Samoa national plans and the 4YP

The 4YP has been implemented in a dynamic strategic environment characterised by:

- two Samoa national plans for the periods 2016–2020 and 2021–2026 with some minor changes between them in the priorities and outcomes
- the NZ Pacific Reset in 2018 and transition to Pacific Resilience in 2021
- annual Samoa country plans prior to the 2021 4YP, and a 4–year Samoa Country Plan from 2025.

However, despite these shifts, the outcomes of the 4YP have remained broadly aligned with the priorities and outcomes of the Samoa national plans. Figure 3 maps the priorities and outcomes of the successive Samoa national plans to each other and to the 4YP and the Samoa Country Plan that it replaces.

Samoa national plans

Key changes to the 2021 plan compared to the 2016 plan included:

- an expansion of the Economic theme to include outcomes in relation to Labour mobility, Business innovation and growth and Global relations which also addressed the Export outcome which was removed as a specific outcome
- shifting the Community development outcome from the Social theme to the Economic theme and focusing on governance, management and service delivery
- shifting the specific Energy outcome from the Infrastructure theme to the Environment theme with a focus on the Sustainable energy outcome (although energy is still addressed broadly in the Infrastructure theme)
- addition of the separate Security and governance theme

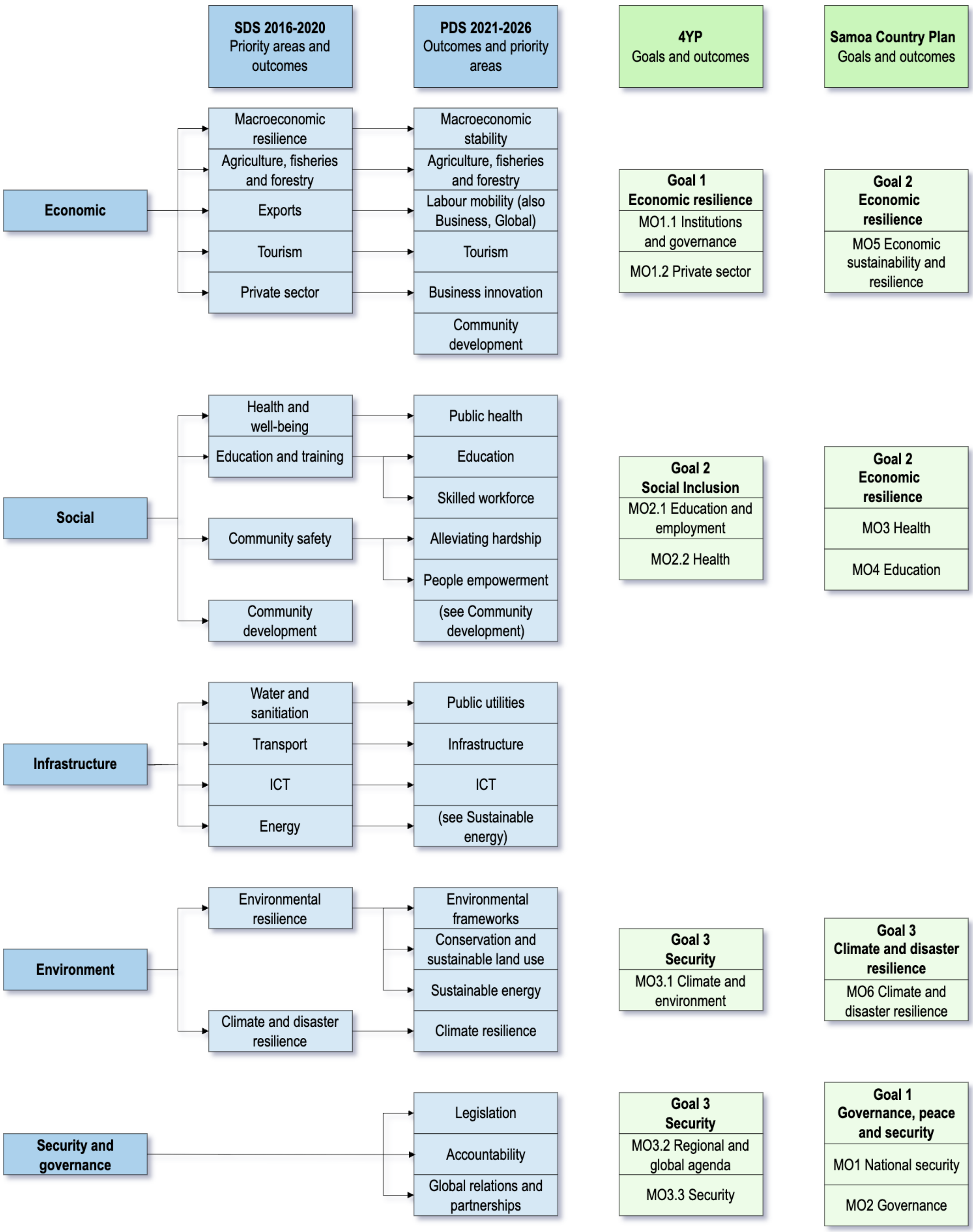
Four Year Plan

The goals and medium– and short–term outcomes of the 4YP broadly align with the 2016 and 2021 national plans, and although Security was not a theme in the 2016 national plan, the 4YP included a Security goal and outcomes.

In terms of the structure of the 4YP goals and outcomes, there are some areas where it is less aligned to the national plans, although it is acknowledged that specific activities have been implemented under the Samoa Programme that address these areas. For example, the Infrastructure theme of the national plans is not included in the 4YP at the goal and medium–term outcome level, although ICT is included in the 4YP as a short–term outcome. Likewise, the Agriculture outcome of the national plans is not included in the 4YP at the goal and medium–term outcome level although it is included in the 4YP as a short–term outcome. In each case, specific activities have been implemented under the Samoa Programme that addressed these national plan outcomes.

A further challenge in assessing the alignment of the 4YP with the national plan outcomes is the categorisation and interconnectedness of outcomes. For example, the 4YP medium–term Private sector outcome can also encompass the Agriculture outcome of the national plans.

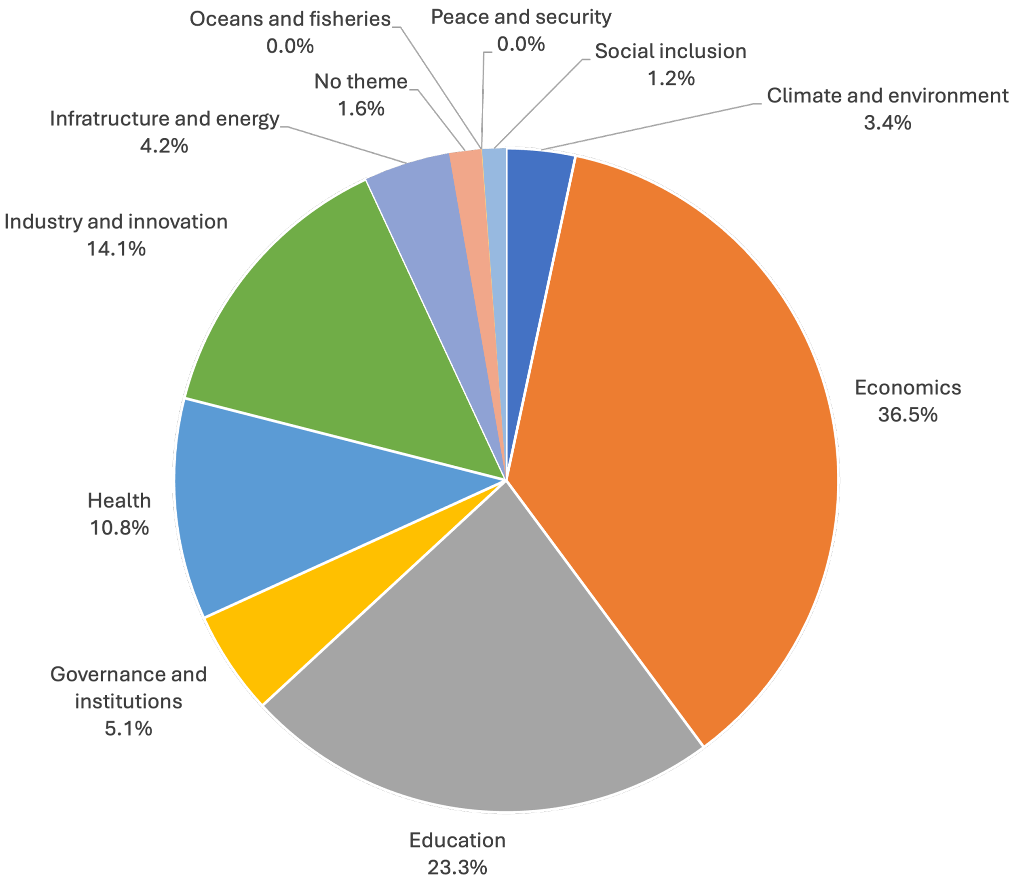
Figure 3 – Alignment of the 4YP with Samoa national plans



Samoa Programme alignment with the strategic priorities

Samoa Programme activities are categorised by themes (with some activities categorised against multiple themes), and this provides an indication of the spread and balance of activity investment by value. Figure 4 shows that the Economics (36.5%), Education (23.3%), Industry and Innovation (14.1%) and Health (10.8%) accounted for nearly 85% of the investment in Samoa. The large allocation to Economics reflects significant investments in budget support activities. Activities with very small allocations include Governance and institutions (5.1%), Infrastructure and energy, (4.2%), Climate and environment (3.4%) and Social inclusion (1.2%). Note that activities focused on Agriculture are allocated to the Industry and innovation theme. Further details of activity expenditure by theme are included in Appendix F.

Figure 4 – Samoa Programme activities across themes (by value)



Note: Activities showing 0.0% indicate a result of less than 0.05%

These themes relate to the five priority themes of the Samoa national plan (Economic, Social, Infrastructure, Climate and environment, and Security and governance and the three goals of the 4YP (Resilience, Well–being and Security).

New Zealand's current Pacific priorities are outlined in New Zealand's International Development Cooperation (IDC) Priorities Framework (2024) which broadly identifies four priorities[8] which are reflected in the 2024–2027 Samoa Country Plan. These priorities are:

- Security, rule of law and democratic institutions
- Addressing climate change
- Economic prosperity
- Social cohesion.

While the 4YP precedes NZ's IDC priorities, the 4YP goals reflect NZ's priorities and the focus of the Pacific Reset. With the exception of Infrastructure, New Zealand's Pacific IDC priorities and the 4YP are aligned with Samoa's national plan priority themes, although Infrastructure has been addressed through specific activities implemented under the Samoa Programme.

The alignment of activities delivered under the Samoa Programme activities across the New Zealand IDC priority themes is shown in Figure 5. This mapping was based on allocating themes to priorities in the following manner:

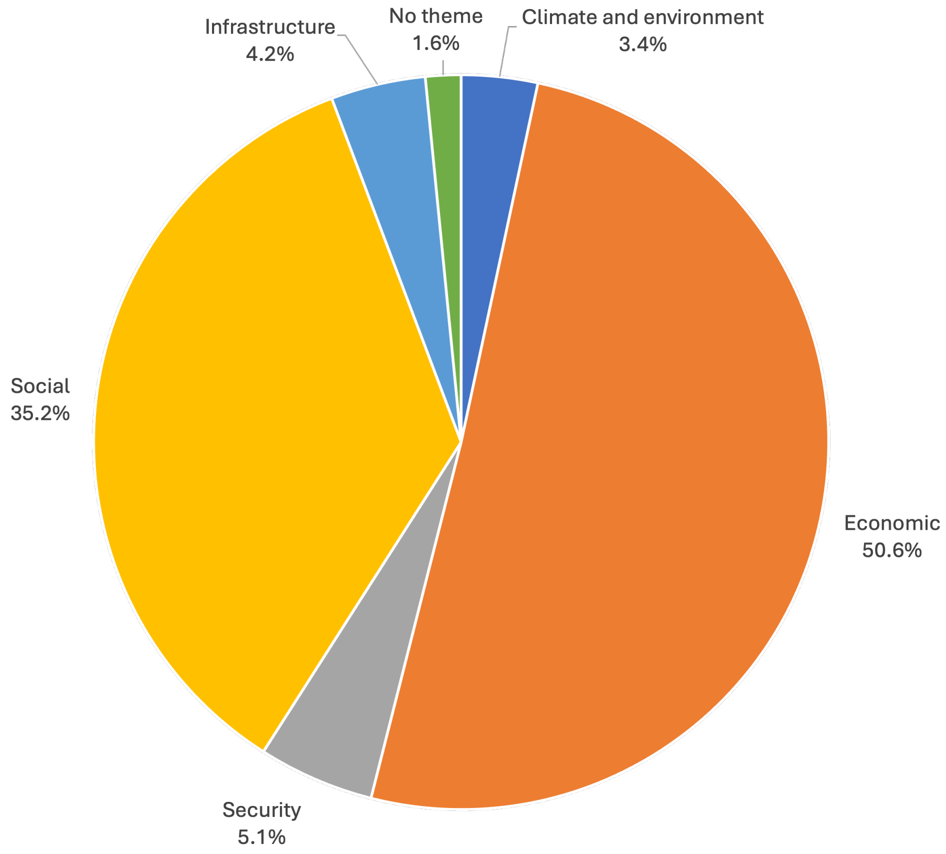
- Governance and institutions, and Peace and security activities were aggregated into the **security** priority.
- Climate change activities were allocated to the **climate and environment** priority.
- Economics, Industry and innovation and Oceans and fisheries activities were aggregated into the **economic** priority.
- Education, Health and Social inclusion activities were aggregated into the **social** priority.
- Infrastructure activities were allocated to the **infrastructure** priority.

Although some activities have been split between multiple themes in this analysis to reflect their relevance to more than one theme, it is acknowledged that the allocation of activities to themes does not fully recognise the interconnectedness of activities. This is particularly the case with Security, which adopts a broad application of security to human health and prosperity and environmental and resource security, in keeping with the Boe Declaration. Likewise, the 4YP approach to Climate change focuses on policy integration and mainstreaming of climate change rather than direct action.

Two priorities, Economic (50.6%) and Social (35.2%), combined are represented by 85.8% of activities by value. It is noted that Climate and environment (3.4%), Security (5.1%) and Infrastructure (4.2%) received a significantly smaller focus than the other priorities. It is acknowledged that analysis by themes may not fully reflect the interconnected and indirect nature of activities that will have addressed the priority themes with a smaller investment. However, this assessment does present an imbalance and a challenge in communicating the focus and achievements of the Samoa Programme, particularly as both security and climate change are the focus of attention in the Pacific.

[8] https://www.mfat.govt.nz/assets/Media–and–resources/Ministry–statements–and–speeches/Activity–based–review–of–the–IDC–Programme–report–on–findings.pdf

Figure 5 – Samoa Programme activities across IDC priority themes (by value)



Assessing the spread and balance of activities across the priorities and outcomes of Samoa's national development plan and New Zealand's Samoa Country Plan is an important tool for monitoring the alignment of the Samoa Programme. However currently the categories used do not provide sufficient precision to provide an accurate assessment of alignment.

4.2 Budget support

Key findings

- The budget support modality is strongly aligned to Samoa's and New Zealand's strategic priorities
- Budget support activities have played a significant role in supporting Samoa to strengthen its enabling environment, institutions and governance, address sector priorities and respond to emergencies
- The relevance of the support provided was strengthened by the strong partnership relationship, clear plans and priorities and ongoing dialogue between partners

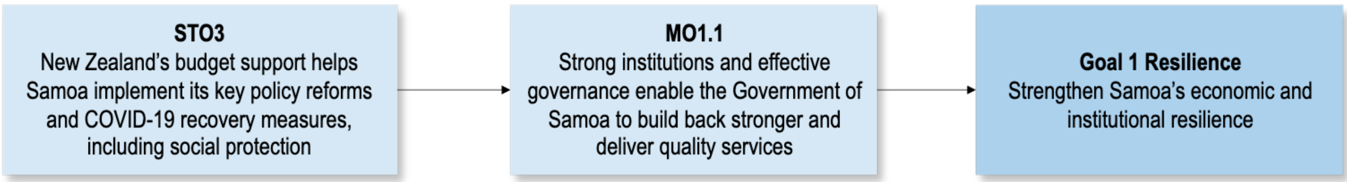
Budget support activities included reform–linked budget support to improve the regulatory environment, sector budget support to progress priorities in national sector plans and emergency budget support. Budget support provides direct grants to GoS which are managed by the Ministry of Finance (MOF) systems and processes, and coordinated by the ACC. New Zealand's budget support investments, along with the investments of other donors, target priority actions agreed by GoS and donors and are monitored using the JPAM.

Strategic alignment

For **Samoa**, budget support is the preferred modality, enabling stronger ownership and agency in using development investments and a stronger focus of strengthening Samoa's institutions and systems. Samoa has a clear planning framework and arrangements to identify national and sector priorities and a coordination mechanism to ensure the JPAM process is aligned with its needs. JPAM commitments are directly aligned with the priorities of the national development plan and relevant sector plans. Budget support is directly aligned with the Economic theme in the Samoa national plan and its focus on macroeconomic resilience. In addition, the 2021–2026 national plan has added the Security and Governance theme which has a focus on legislation.

For **New Zealand**, budget support is a strong reflection of its commitment to partnership with Samoa and its focus on resilience, which flows from its Pacific 'reset to resilience' approach, its Pacific strategic goal and New Zealand's 4YP and Samoa Country Plan. In relation to the 4YP, budget support is directly aligned with Goal 1 (Economic and institutional resilience) which is achieved through specific short–and medium–term outcomes as shown in Figure 6.

Figure 6 – 4YP budget support goal and outcomes



Relevance

The relevance of Samoa Programme budget support extends beyond strengthening Samoa's enabling environment and institutions and governance, which is a significant need and highly relevant to Samoa's future resilience and growth. Budget support also assists Samoa to address sector priorities, for example in the education and climate change sector. The relevance and value of budget support was heightened by the impacts of COVID–19, which severely impacted Samoa's tourism–dependent economy and budget support was used to assist with emergency response, alleviation of debt distress and COVID–19 recovery.

The JPAM process includes mechanisms for monitoring and regular meetings to review progress and update the policy commitments. This ensures the ongoing relevance of the JPAM to Samoa's and donor's priorities.

Budget support has been used to progress sector priorities beyond regulatory reform, for example in the education sector where New Zealand and Australia have coinvested in the Education Sector Support Programme using budget support. Although the Final Evaluation of this Programme identified some issues with the budget support modality, mainly relating to institutional challenges such as agency coordination and collaboration, capacity, staff turnover and the increased reporting requirements of donors. The report recommends continuing the budget support mechanism with clear performance targets, better sectoral integration and coordination and technical assistance for capacity development and suggested link to the JPAM. Given New Zealand's confidence in Samoa's maturing institutions and governance and Samoa's preference for budget support, consideration could be given to the wider use of budget support, including through the JPAM, to address sector priorities beyond regulatory reform.

4.3 Support for CHOGM

Key findings

- The support for CHOGM was directly relevant to Samoa's needs and to New Zealand's strategic priorities
- The delivery of support was well–targeted and practical
- The relevance of the support provided was strengthened by existing interagency relationships, a partnership approach and the availability of New Zealand personnel with Samoan backgrounds

New Zealand's support for Samoa's hosting of CHOGM 2024 was a NZD15 million activity that provided technical and financial support to ensure Samoa's successful planning and delivery of CHOGM 2024.

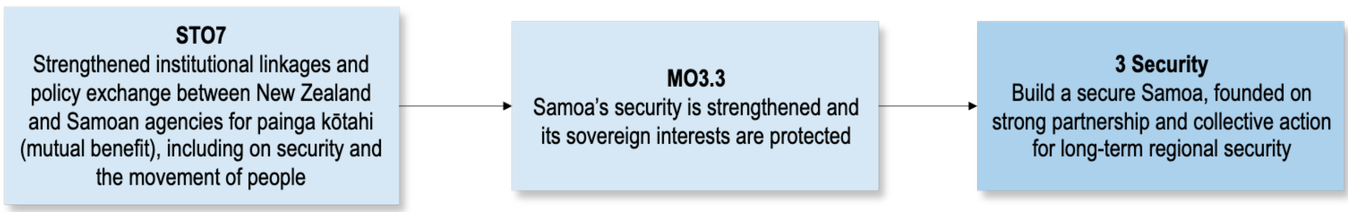
Strategic alignment

Although the activity responded to a direct request from Samoa, it was aligned with key New Zealand strategic priorities, including:

- the value New Zealand places on the Commonwealth as a collective voice and advocate for Small Island Developing States (SIDS), particularly as one–third of the Commonwealth's small state members are Pacific SIDS and Samoa was the first Pacific SIDS to host CHOGM
- the opportunity to articulate the development challenges of SIDS in regional and international forums
- New Zealand's commitment to partner with the Pacific (see NZ MFAT Strategic Intentions 2024–2028)
- a reflection of New Zealand's strong partnership relationship with Samoa and the goals and outcomes of the 4YP
- the opportunity that a successful CHOGM would provide to Samoa to showcase its tourism and conference capability which may contribute to future economic growth
- strengthening of institutional linkages between Samoan and New Zealand agencies.

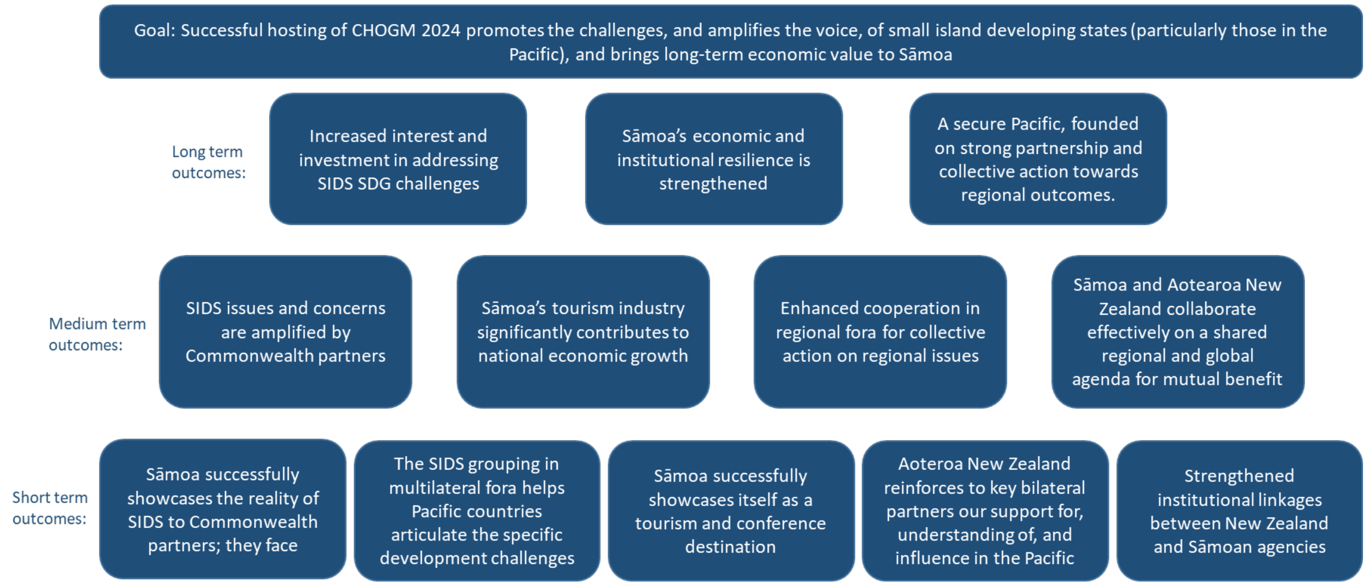
The CHOGM support activity was directly aligned with the Security theme in the Samoa national plan and the 4YP Goal 3 (Build a secure Samoa). Figure 7 shows the 4YP short– and medium–term outcomes that contribute to this goal.

Figure 7 – 4YP security goal and outcome



The rationale for the activity was supported by a program logic which is shown in Figure 8.

Figure 8 – Support for CHOGM program logic



Relevance

The activity responded to immediate and practical needs identified by Samoa and in consultation with Samoa MFAT and Samoa MOF. The support provided by the activity included:

- funding for supplementary accommodation (cruise ship charter)
- mobilisation of New Zealand agency personnel (including Customs, Fire and Emergency, Medical Assistance, Defence and Police) to provide planning, technical advice and capacity building
- procurement of infrastructure such as an accommodation booking system, and x–ray machines.

Feedback from Samoan counterparts indicated that the support provided was highly relevant to the specific and practical needs faced by Samoa and was instrumental in the successful hosting of the event.

> New Zealand supported us with CHOGM by connecting us with the New Zealand agency. When they mobilised, they were mostly Samoan diaspora, 20 people and two top officers in all. They worked closely with our teams to understand what types of support we might need for a successful CHOGM. They helped with planning support and to develop a resourcing plan, and they supported implementation of the plan with their different people working closely with our people. They adapted easily to our systems and on ship days they joined us.
>
> GoS stakeholder

It was noted by Samoan counterpart agencies that the approach used by New Zealand personnel was based on partnership and codesign, with New Zealand personnel working side–by–side with Samoan counterparts, which also ensured that the support provided was relevant and targeted to the needs of Samoan agencies.

> NZ went above and beyond. Numerous capacity building trainings. Eight officers from NZ on the ground during CHOGM week to assist on our team. They were rostered in–line, working together with our teams. They provided laptops, printers, training, the Hercules airplane.
>
> GoS stakeholder

In a number of cases, the support built on existing interagency relationships, and many of the New Zealand personnel mobilised to Samoa were of Samoan background which contributed to the organisational and cultural relevance of the delivery of support.

4.4 Cocoa agriculture development

Key findings

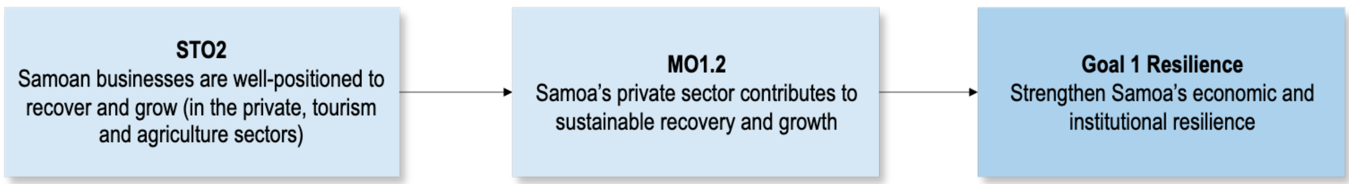
- The activities targeted a crop with strong potential to contribute to increased production and earnings, employment and economic growth
- Cocoa is widely grown, and farmers have experience that can be developed to realise the full potential of the crop
- The activities were relevant to the immediate needs of cocoa farmers, in terms of access to training on improved practices, and to quality seedlings and export opportunities

Cocoa is grown extensivity in Samoa (it is estimated that 65% of all Samoan households grow some cocoa) and has significant potential for growth, particularly with increasing demand, high and increasing prices and supply chain challenges in some major producing countries.

Strategic alignment

Though not explicitly identified as a priority commodity in the Agriculture and Fisheries Sector Plan, developing cocoa agriculture is broadly aligned to the national plan and sector plan. Cocoa agriculture development is directly aligned with the Economic theme in the Samoa national plan and the 4YP Goal 1 (Economic and instructional resilience) which is achieved through specific short–and medium–term outcomes as shown in Figure 9.

Figure 9 – 4YP cocoa agriculture development goal and outcomes



Relevance

Cocoa agriculture development is highly relevant to the Samoan context and need – it is grown widely though to a varying extent, there is an established domestic demand for cocoa paste (*koko Samoa*) which is also sold as an informal export and it has potential to meet rising export demand, particularly through New Zealand producers.

As a result, support by New Zealand for cocoa agriculture development was and continues to be an important and relevant activity for the growth of cocoa production for the domestic and export market and for cocoa farmers and cocoa associations of Samoa. The mid–term review of one cocoa agriculture activity conducted found it to be relevant to the needs of the industry.

> The SCIDI project is an important initiative that is well designed to meet the needs of the Samoa cocoa industry and its development needs.
>
> *Review of the Samoa Cocoa Industry Development Initiative, 2020*

4.5 Private sector development

Key findings

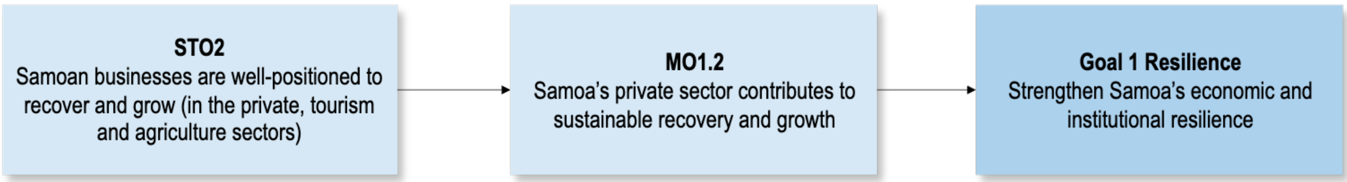
- Private sector development is a key driver of economic growth and highly relevant to Samoa's economic resilience goals
- The private sector development activities targeted areas of critical need such as the enabling environment, institutional development of support service providers and direct support for businesses

The Samoa Programme supported private sector development directly through the Private Sector Development Programme implemented in Samoa as well as regional programmes which included Samoa. Other activities delivered under the Samoa Programme also focused on the private sector, including tourism and cocoa agriculture, as well as activities in the enabling environment such as infrastructure and the digital economy and the reform–linked budget support.

Strategic alignment

Private sector development is directly aligned with the Economic theme in the Samoa national plan and the 4YP Goal 1 Economic and instructional resilience, which is achieved through specific short–and medium–term outcomes as shown in Figure 10.

Figure 10 – 4YP private sector development goal and outcomes



Relevance

While growth in the private sector is a key driver in economic growth and macroeconomic resilience, it has broader relevance to national development through interconnected outcomes such as increased employment and wages, expanded education and training opportunities and ultimately improved social well–being.

> We appreciate the Government of New Zealand for their ongoing support, as their assistance has been crucial in promoting an enabling business environment and supporting our efforts toward sustainable growth and prosperity
>
> GoS agency stakeholder

Private sector development support is a critical need in Samoa due to the challenges it faces including:

- an economy heavily reliant on tourism and remittances
- low levels of foreign investment
- limited diversification across sectors
- a significant trade deficit (particularly in goods)
- a low number of registered companies compared to sole traders

- the need for employment creation.

The Samoa Programme private sector development activities were delivered in the context of Samoa's Trade, Commerce and Manufacturing Section Plan, including the 2017–2021 and 2024–29 plans. The Ministry of Commerce, Labour and Industry (MCIL) reported that at the sector level, the activity closely aligned with the objectives of these plans which prioritise business competitiveness, value adding and innovation – all of which are supported through the Samoa Programme.

The Samoa Programme activities are also relevant to other national policies such as the Micro, Small and Medium Enterprises Policy, the National Industrial Development Policy and the National Investment Policy Statement.

Outputs delivered in the Samoa Programme activities targeted areas of direct need that were critical to private sector development, such as direct services to businesses including financing, advice and training.

5. Effectiveness

Key evaluation question

How successful has the Samoa Programme been in achieving its intended results?

Effectiveness relates to achieving the planned results and considers factors such as achievement of outputs and outcomes (including long–term outcomes), mechanisms for funding and delivery, partnerships and sustainability.

5.1 Overall findings

Key findings

- The Programme was delivered in the context of significant improvements in key indicators for Samoa including GDP, employment and wages growth, governance and digital development, although the prevalence of non–communicable diseases remains a significant challenge. While it can be reasonably assumed that the Programme has contributed to these improvements, attribution is difficult to measure.
- Overall, the activities funded under the Programme have delivered their planned outputs and achieved short–term outcomes, though these are difficult to aggregate for the Programme
- The Programme has utilised a range of funding and delivery modalities which have been effective, particularly budget support, regional organisations and programmes and co–investment with other donors
- Embassy Funds grants are an effective use of funds in that they broaden the reach and visibility of New Zealand's support through a very small total investment
- The balance between outputs and outcomes reporting can be improved

The Samoa Programme was a significant IDC investment by New Zealand over the evaluation period and represents 8.0% of New Zealand's total PDC expenditure. The Programme invested NZD257.8 million in 215 separate activities. The delivery of the Samoa Programme is summarised in Table 7.

Table 7 – Samoa Programme snapshot

	2018–2021	2021–204	Total
Expenditure	NZD73.3m	NZD156.7m	NZD257.8m
Number of activities	124	143	215
Average value	NZD591,365	NZD1,095,732	NZD1,199,260
Activity value range			
Below NZD10,000	27	27	45
NZD10–100,000	48	35	58
NZD100,000–1m	35	63	74
over NZD1m	12	16	35

Note: As some activities were active in both triennia, the total figures for the period do not reflect the sum of each triennium

While the number of activities delivered in each triennium was similar, the total expenditure and average value of activities increased significantly in the 2021–2024 triennium – average value increased by 85% and total expenditure increased by 114%, reflecting the increased number of high value activities, particularly budget support activities and post–COVID and CHOGM support funding.

Results against the 4YP goals and outcomes

While the 4YP provides specific goals and outcomes to guide the Samoa Programme, and includes some indicators, the 4YP does not have a separate MERL framework. A number of the indicators are qualitative and difficult to measure, although the 4YP does reference some key published statistics to measure its contribution to the 4YP goals, which are discussed below.

While it cannot be suggested that the results against these indicators can be attributed directly to the Samoa Programme, it can be assumed that due to the alignment of the Samoa Programme with these goals the Programme will make a contribution, which is evident in the following long–term results.

Resilience (Goal 1)

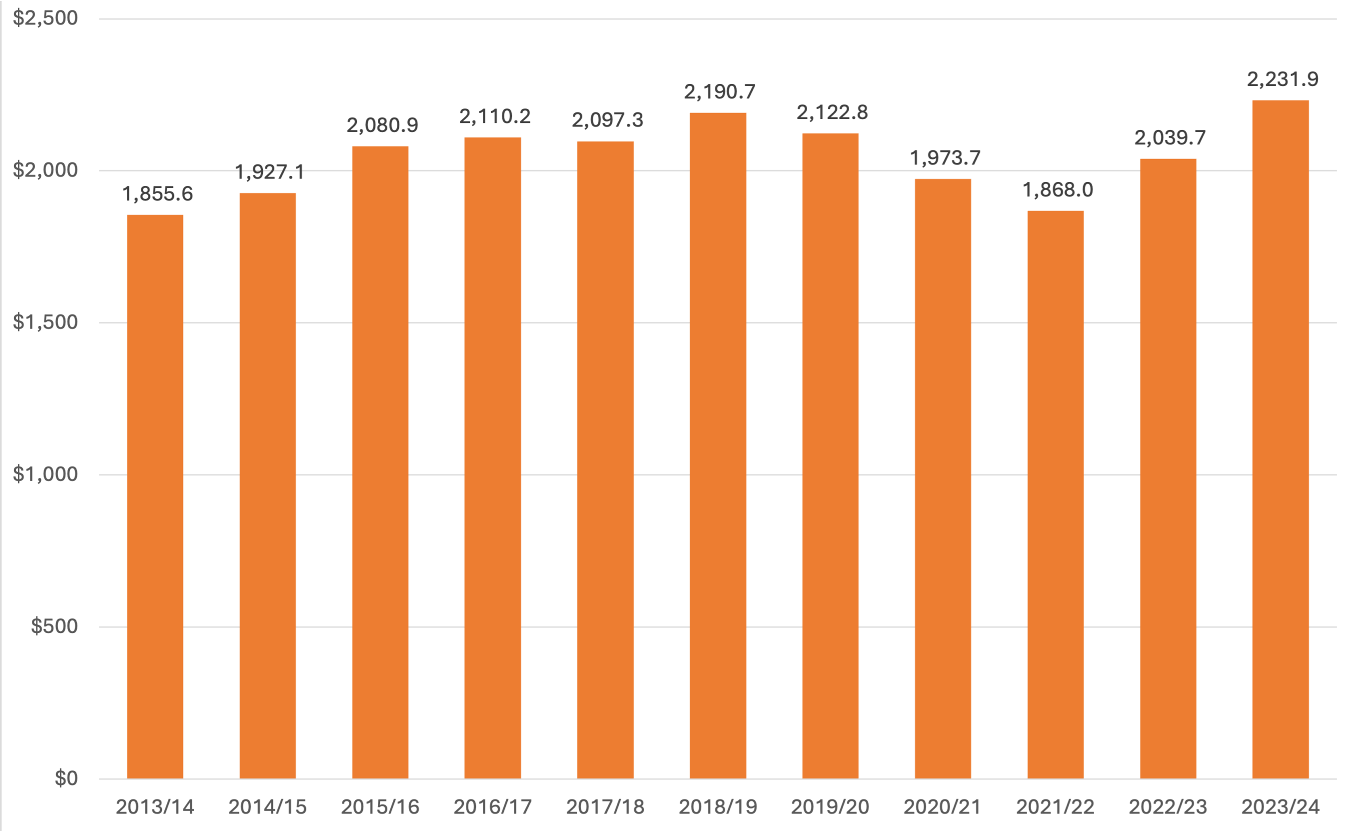
A key indicator for Goal 1 is **annual GDP growth**. Prior to COVID–19, Samoa had been showing steady growth in GDP. Over the period 2013–2019, GDP increased 18% and averaged annual growth of 3.6%. Over the three years 2020, 2021 and 2022, GDP (at constant prices) decreased by 14% compared to 2019. In each of the years 2023 and 2024, annual GDP growth was over 9% and by June 2024 had returned to and exceeded pre–COVID levels by 1.9%. For the twelve months to March 2025, GDP increased by 2.0%.

While all sectors were impacted by COVID–19, the Accommodation and Restaurant sector's GDP fell significantly from WST8.2 million in March 2020 to WST1.8 million in June 2020. Since then, it and other sectors have returned to pre–COVID levels, with the exception of Construction and Other manufacturing.

Although New Zealand's budget support for Samoa covered a small proportion of the country's GDP, it was timely, needed and a clear demonstration of New Zealand's partnership in a critical time and will have contributed to Samoa's post–COVID recovery, however this is difficult to measure.

The trajectory of Samoa's GDP growth over the period 2013–2024 is shown in Figure 11.

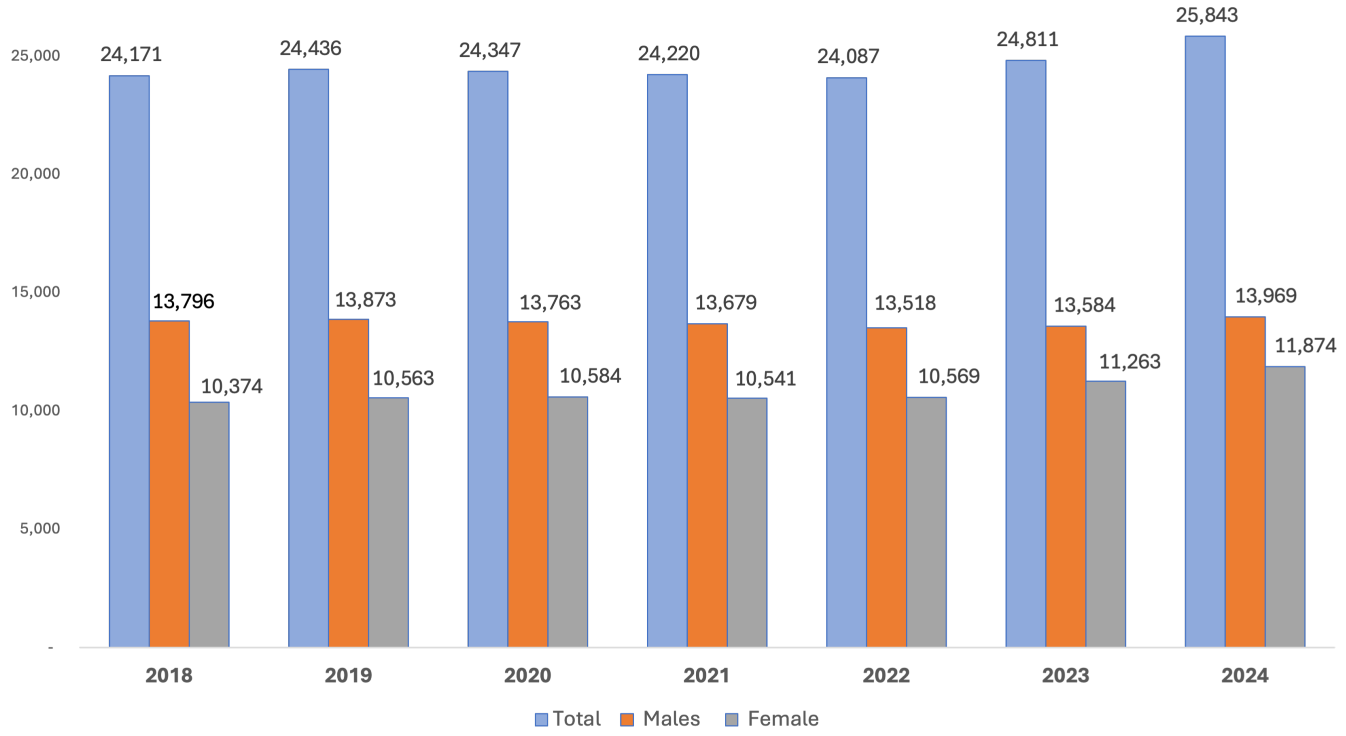
Figure 11 – GDP Growth 2013–2024 (WSTm)



Source: Samoa Bureau of Statistics

Unemployment rates for women and youth is also a key indicator for Goal 1. SBS employment data shows a COVID–related dip in employment for both males and females, and a recent small increase in employment to above pre–COVID numbers. In 2018, women represented 42.9% of the workforce, and this has risen to 45.9%, while male employment has declined slightly over the period. The employment trends are shown in Figure 12.

Figure 12 – Employment 2018–2024



Source: Samoa Bureau of Statistics

SBS does not regularly report unemployment rates; however, the *Samoa Labour Force Survey 2017* reported a national unemployment rate of 14.5%, with a male unemployment rate of 10.6% and female unemployment rate of 21.3% – more than double the male unemployment rate. The youth unemployment rate (15–24 years) was 44.7%, of which 53.1% were female.

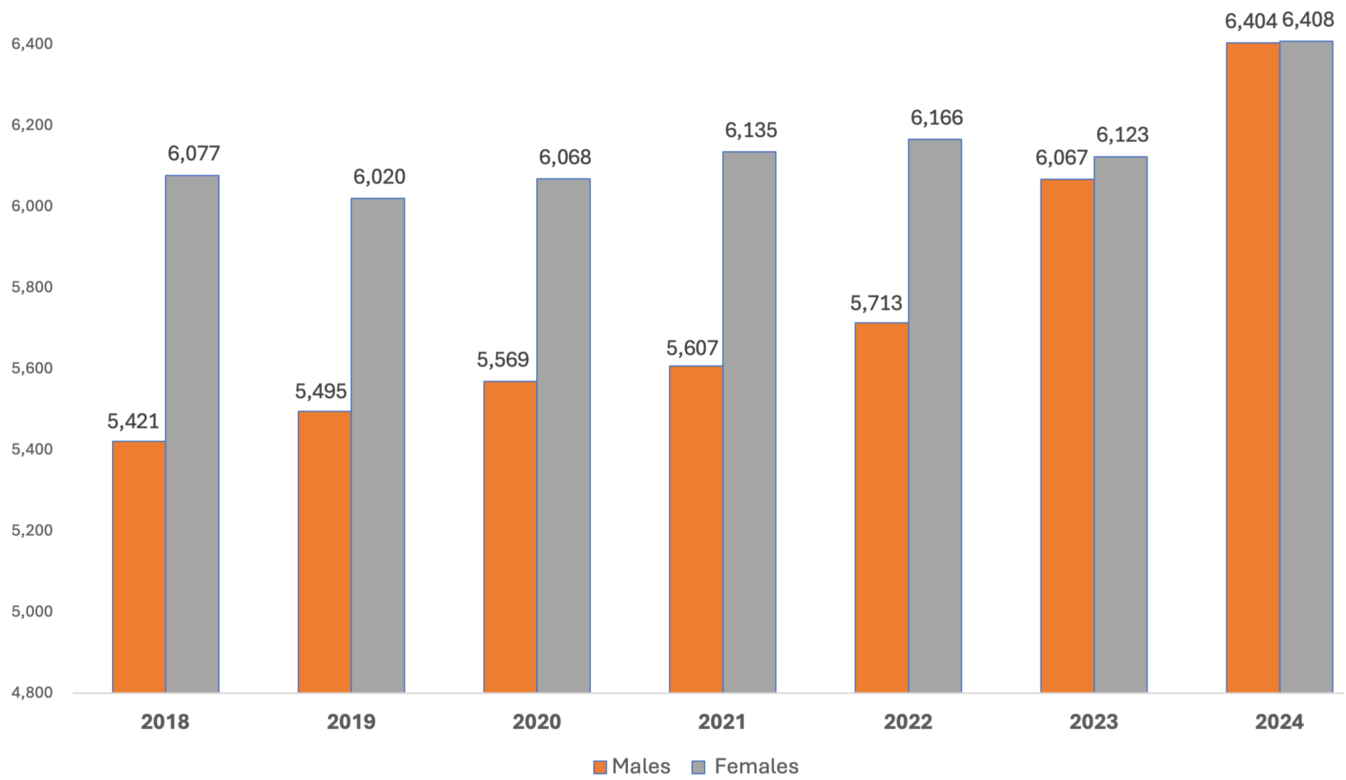
The *Samoa Labour Force Survey 2022* reported a markedly improved unemployment rate, which the report attributes to the reopening of borders post–COVID. The national unemployment rate fell to 5.0%, with a male unemployment rate of 3.5% and female unemployment rate of 7.8%. Females represented 56.0% of unemployed Samoans. The youth unemployment rate also fell, from 44.7% in 2017 to 13.4% in 2022. Again, although the rate had dropped, the disparity between males and females remained, with female unemployed youth making up 59.1% of this group. While the percentage of unemployed female youth was similar in each survey, the result for female youth in the 15–19 years group increased markedly to 64.9% in 2022, as shown in Table 8.

Table 8 – Unemployed women and youth

Age group	2017				2022			
	Total	Males	Females	% Female	Total	Males	Female	% Female
15–19 years	964	470	493	51.1	544	191	353	64.9
20–24 years	2,147	990	1,158	53.9	799	357	442	55.3
Over 25 years	3,850	1,807	2,043	53.1	1,482	694	788	53.2
Total	**6,961**	**3,267**	**3,694**	**53.1**	**2,825**	**1,242**	**1,583**	**56.0**

Another key indicator for Goal 1 is **income inequality**. Wage data reported by SBS shows wages growth as well as disparities between male and female earnings (Figure 13). Over the period 2018–2024, average male **quarterly** wages have increased by 18.1%, while female wages have increased by 5.4%. However average male wages were 10% lower than female wages in 2018, and male and female wages achieved parity in 2024.

Figure 13 – Average quarterly wages (WST)



Income inequality is measured through the Gini Index, where 0 represents perfect income equality and 100 represents perfect income inequality. Samoa's Gini Index is estimated from Household Income and Expenditure Surveys, with estimates available for 2002, 2013, and 2023 returning scores of 40.7, 38.7 and 39.5. This suggests that Samoa's income inequality since 2013 has been slowly rising. Factors such as COVID–19 and inflation may have contributed to this.

Governance is also a key indicator for Goal 1. The World Bank publishes percentile ranks for six governance indicators for Samoa for the years 2013, 2018 and 2023. These results show continued and increasing rankings for

Samoa over the six indicators, which are shown in Table 9. Countries are ranked from 0 to 100, with 100 assigned to the highest–ranked country. Samoa currently ranks very highly for political stability (90.52) and rule of law (79.72), and in 2023 increased its ranking in 3 of the indicators – voice and accountability, rule of law and control of corruption.

Table 9 – World Bank governance indicators

Indicator	2013	2018	2023
Voice and accountability	60.09	72.82	80.88
Political stability and absence of violence and terrorism	81.89	90.57	90.52
Government effectiveness	57.87	73.33	68.87
Regulatory quality	44.55	47.62	42.92
Rule of law	71.83	77.62	79.72
Control of corruption	62.56	73.81	75.94

Source: https://www.worldbank.org/en/publication/worldwide–governance–indicators/interactive–data–access

The governance results confirm the confidence New Zealand has in using reform–linked budget support funding, and the lower scores on regulatory quality and government effectiveness confirm the continuing need for this type of modality to address these issues.

The final key indicator for Goal 1 relates to **the digital economy**. The UN's e–Government indicators show that over the period 2018–2024, Samoa's e–Government Development Index has improved from 0.42360 to 0.48990, although its ranking has dropped from 128 to 140 (out of 193 countries). Samoa's improvement on the e–Participation Index has been more significant, from 0.26400 to 0.30140 and its ranking rose from 155 to 130[9]. SPC's Digital Development indicators show that digital access (coverage, utilisation and cost) in Samoa has also improved over the period 2018–2024. For example, cellular network coverage (from 97% to 99% of the population), internet usage (49.1% to 75.3% of the population) and costs, although cost changes over the period are variable depending on the subscription package. For example, the largest mobile voice and data monthly subscription package decreased from USD30.07 to USD20.54 over the period[10].

Samoa has made significant progress in the digital economy and Samoa Programme activities have directly supported this.

Goal 2 – Wellbeing

A key indicator for Goal 2 is the proportion of **youth not in employment, education or training** (NEET). The *Samoa Labour Force Survey 2017* reported a NEET of 37.9%, which was an increase from 35.0% in 2012 (gender disaggregated NEET are not provided for 2017 or 2012). The *Samoa Labour Force Survey 2022* reported a decrease in NEET to 30.1%, with the male youth NEET 27.6% and female youth NEET higher at 32.7%.

Investments that increase access to employment opportunities and education and training pathways will continue this reduction in NEET, and Samoa Programme activities that focus on private sector development and education and training are contributing to this.

9 https://publicadministration.un.org/egovkb/en–us/Data/Country–Information/id/146–Samoa/dataYear/2024

10 https://stats.pacificdata.org

Non–communicable diseases is also an indicator in Goal 2. World Bank data shows that the prevalence of diabetes in Samoans aged 20–79 has increased from 7.7% in 2011 to 25.4% in 2024[11] and the mortality rate from cardiovascular disease, cancer, diabetes and chronic respiratory diseases for Samoans aged 30 to 80 remains consistently high, with little change between 2018 and 2021 (32.3%).[12] In 2021, 83% of deaths were due to non–communicable diseases, compared to 63% globally and 87% for the Pacific region[13]. Non–communicable diseases are a significant burden for Samoa, and the Samoa Programme investments in strengthening Samoa's health system are making an important contribution to this.

Programme delivery

Data available on the current delivery stage of activities is based on the allocation of activities to one of four categories – design, implementation, closing or closed. On this basis, the status of activities delivered during 2018–2024 is:

- 89 activities are in implementation (41.4%)
- 64 activities are in design (29.8%)
- 12 activities are closing (5.6%)
- 50 activities are closed (23.2%)

However, there are several anomalies in this categorisation, including the high number of activities still in the design stage, including 24 activities started during the 2018–2021 triennium. In addition, 10 activities implemented in the 2018–2021 triennium are categorised as in implementation have not incurred expenditure in the 2021–2024 triennium. A further 3 activities implemented in the 2018–2021 triennium and which incurred expenditure in the 2021–2024 triennium are categorised as closing. These anomalies indicate inaccuracies in the coding of activities and suggest the number of closed or closing activities should be much higher.

From our review of individual activity reports, it is clear that in general, the activities have been successful in delivering their planned outputs, although delivery has faced delays that are not unexpected in the delivery of development programs. A significant factor causing unexpected delays was COVID–19 which required activities to quickly pivot to alternative delivery arrangements, including the use of remote arrangements for delivery of services. Another factor which has led to unexpected delays is the underestimation of the capacity of local delivery partners to support implementation.

Funding and delivery modalities

The Samoa Programme uses a range of modalities including reform–linked budget support, funding to regional (multi–country) programmes or facilities, contracting to delivery partners including New Zealand agencies (NZ Inc) and scholarships. Information available on the 215 activities delivered through the Programme does not enable an assessment of the distribution of activities across these categories. However, information is available on the funding source of activities, and this is shown in Figure 14. The largest allocation (by value) is the Samoa Core fund (55.4%) which includes budget support and sector activities such as education and health, followed by

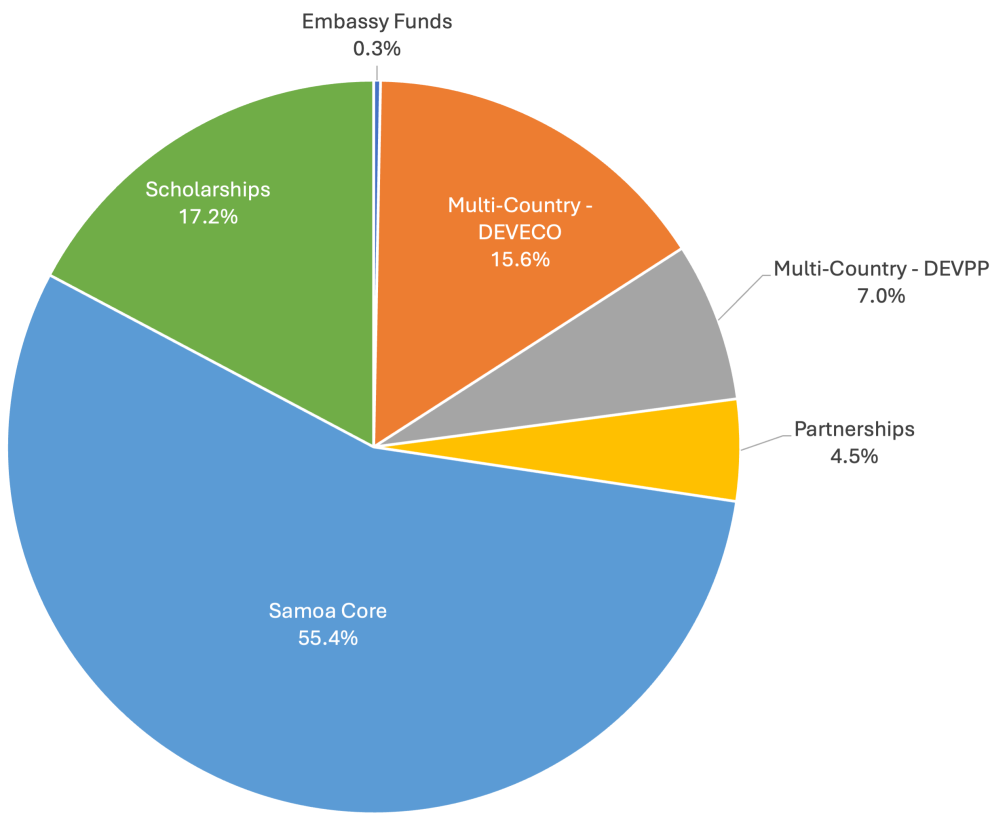
[11] https://data.worldbank.org/indicator/SH.STA.DIAB.ZS?locations=WS

[12] https://data.worldbank.org/indicator/SH.DYN.NCOM.ZS?locations=WS

[13] *Samoa, Health at a glance*, World Health Organization, 2024

Scholarships (17.2%). Multi–country DEVECO[14] activities account for (15.6%) and multi–country DEVPP[15] activities account for 7.0%.

Figure 14 – Activities by funding source



The Samoa Programme has been able to harness the diversity of modalities available, applying them as appropriate to the needs and contexts of specific activities. The use of budget support, which is discussed separately, is preferred by Samoa and New Zealand has made budget support a priority modality for its investments in the Pacific.

> The Government has a strong preference for the provision of aid through budget support rather than discreet projects and programmes. This preference for budget support is directly related to Government's objective to increase national ownership and leadership in the management of aid programmes and to strengthen national institutions, systems, and procedures through which all national revenues and expenditures are channeled.
>
> Samoa Ministry of Finance, Development Cooperation Policy, 2010
>
> To support New Zealand's strategic direction in the Pacific, the Ministry plans to increase use of reform–linked budget support in the Pacific, paired with technical advice and a more strategic approach to bilateral dialogue.
>
> New Zealand Ministry of Foreign Affairs and Trade,
> New Zealand's International Development Cooperation Programme: Activity–based review, 2024

[14] Development Economy and Prosperity Division, NZ MFAT

[15] Development People and Planet Division, NZ MFAT

The Samoa Programme has also leveraged its investment through a multi–country approach, including using regional multilateral programmes such as Business Link Pacific (BLP), MDF and Pacific Horticultural and Agricultural Market Access (PHAMA) Plus. While these may bring obvious advantages such as economies of scale achieved using a single managing contractor and standard processes such as corporate services, practice development, knowledge management and MERL, they require close attention to ensuring country–specific deliverables and outcomes. This involves coordination and collaboration both *within* programmes across countries as well as *between* programmes. Feedback from stakeholders indicates that coordination and collaboration can be improved.

Bilateral relationships

Activities delivered under the Samoa Programme build and strengthen bilaterial relationships at all levels, particularly with leaders in government and non–government agencies. This includes:

- central agency relationships through reform–linked and sector budget support activities
- delivery of activities through ministries
- inclusion of local non–government and civil society organisations in local delivery arrangements, such as the Samoa Chamber of Commerce and Industry (SCCI), the Salvation Army, Football Federation Samoa and grower organisations
- direct support to a wide range of local organisations through the Embassy Fund grants, including schools, advocacy and support organisations, and sporting associations and clubs
- strengthened bilateral relationships between counterpart agencies in Samoa and New Zealand, particularly through the CHOGM support activity.

The Embassy Fund is particularly effective in that it supported 61 organisations over the 2018–2024 period for a total of NZD788,138, which represented only 0.3% of the Samoa Programme's total expenditure – a significant reach in relation to expenditure. These grants met an important need, would have had community impact and broadened bilateral relationships at the local level. Overall, the delivery of the Samoa Programme through its partnership and people–to–people approach, locally–led design and broad coverage across government and non–government agencies is an appropriate and effective vehicle for strengthening bilateral relationships at all levels. Feedback from stakeholders confirmed the quality of the relationship and the visibility of New Zealand's investments in Samoa.

Leveraging investments by other donors and development partners

Although the available activity data does not enable a full assessment of the distribution of Samoa Programme investments across programmes funded by other donors and development partners, the Programme has taken advantage of these opportunities to benefit the Programme. This is particularly the case with its budget support investments, which combine investments by other donors, including the World Bank, Asian Development Bank (ADB), the European Union (EU) and the Australian Department of Foreign Affairs and Trade. Activities investing in regional programmes such as the MDF and PHAMA Plus also leverage co–investment by the Australian Department of Foreign Affairs and Trade. The Samoa Programme also invests in regional programmes delivered by regional bodies such as SPC (for example Pacific Seeds for Life), which enables the Programme to utilise the established regional relationships, networks and technical expertise of these organisations.

Large activities in sectors such as health and education also leverage other donor programmes. For example, the Strengthening Primary Health Care Across Samoa activity was a co–investment in the World Bank Samoa Health System Strengthening Program–for–Results (PforR) programme. The Samoa Education Sector Support

Programme 2020–2024 was funded in partnership with the Australian Department of Foreign Affairs and Trade through sector budget support which targeted education priorities under Samoa's Education Sector Plan 2019–2024.

The use of co–investment can provide several benefits for the Samoa Programme including leveraging New Zealand's investment to achieve enhanced outcome and impacts, contributing to a more integrated approach to programme delivery and improving coherence and coordination between donor investments. The Samoa Programme's approach also sits within Samoa's aid coordination framework which seeks to improve coherence and coordination between donors and development partners.

The level of activity that results from donor and development partner investments is a key challenge for Samoa's absorptive capacity as it is for other countries in the Pacific region and this is reflected in the limited capacity of local delivery partners to implement activities, which was the case for example in the Education Sector Support activity.

> At the sector level, the main risks are limited capacity within implementing agencies (MEC, NUS and SQA) due to staff turnover. This may impact the education sector's ability to deliver on the Activity's outputs. The sector will prioritise the development of a sector capacity development plan in the next financial year to address this issue. There is also the ongoing issue of a teacher shortage in Samoa. This remains a major risk to achieving outcomes for the students. The MEC in collaboration with the NUS and Samoa's Public Service Commission are exploring various options such as rehiring retirees and hiring 'relieving' teachers.
>
> Samoa Education Sector Support 2020–2024, Activity Monitoring Assessment, 2023–2024

There is a need to recognise the additional load that donor investments place on implementing partners, both in terms of the implementation of the development intervention as well as meeting donor system requirements for the investment, such as planning and coordination, monitoring and reporting results and managing and acquitting expenditure. For these investments to be effective, consideration needs to given to the support that needs to be included in activity budgets for the institutional strengthening required for implementation, which may include additional resources for administration. This is also addressed elsewhere in this report.

4YP outcomes

There are two challenges in undertaking an overall assessment of the contribution of Samoa Programme activities to the 4YP.

Activity outcome alignment to 4YP outcomes

The activity reporting format requires activities to identify the 4YP outcomes that the activity is aligned with. In the documentation reviewed for this evaluation, some activities do not include this information, while others identify the outcomes developed for the activity or for the multi–country programme that the activity participates in, rather than the 4YP outcomes.

Outcome reporting

While the 4YP identifies short– and medium–term outcomes, the Plan does not have a MERL framework or indicators to guide assessment of achievement of outcomes. Activity reports reviewed for this evaluation provide evidence of the achievement of outcomes, particularly short–term outcomes. However, it is not possible to provide a detailed assessment of the contribution of these outcomes to the 4YP outcomes due to several factors, including:

- activity reports are available for a limited number of activities

- activity reports focus on short–term outcomes only
- several activity reports comment on the achievement of **activity** outcomes, not 4YP outcomes
- several activities do not have a MERL framework

As a result, it is not possible to aggregate activity reporting to assess the contribution to 4YP outcomes, and this is also a challenge due to the diversity of outcome indicators. MERL reporting is also challenging as in several activities, the activity relies on reporting by implementing partners which may have a limited focus on outcome reporting, particularly in the absence of a MERL framework or one that is easy to use.

> Partner reporting on progress focused on outputs, which needs to be balanced by more reporting on progress towards outcomes. We expect this imbalance to be addressed in future reports following a recent MERL workshop delivered by DCI. The workshop enabled the partners to re–visit the problem, helped refine the programme logic, and translated the first 4 Strategic Priorities into medium and short–term outcomes. These, together with clearer indicators will result in an improved results framework for future reporting.
>
> Regional Audit Support 2019–2024, Activity Monitoring Assessment, 2019–2020

This is not to say the Samoa Programme is not contributing to the 4YP outcomes: rather that an overall assessment is not possible, although individual activities have delivered their planned outputs which are designed to achieve short–term outcomes, and activity reports provide evidence of achievement of these outcomes.

ICESD principles

The following ICESD principles are quality standards for the delivery of development activities.

- **Effective development** is values driven, partnership focused, adaptive, outcomes–focused and evidence–based
- **Inclusive development** addresses exclusions and inequality created across all dimensions of social identity, while promoting human rights, and equitable participation in the benefits of development.
- **Resilient development** strengthens the environment, economy, and societies to withstand shocks and manage crises while protecting future well–being.
- **Sustained development** enables lasting progress and is locally owned to uphold results in the long term.

These principles underpin the 4YP and the Samoa Programme and are generally reflected in the approach to delivery. Discussions in the previous sections highlighted ways in which the Samoa Programme is consistent with the ICESD principles, such as the focus on partnership, locally–led development and strengthening resilience. The significant use of the budget support modality promotes local ownership and agency while strengthening resilience.

Earlier versions of the activity report were structured to report specifically against these principles; however, the current version does not require this. Where there is reporting, the analysis is variable. For example, commentary under **effective development** tends to describe the achievement of outputs and outcomes, with limited reference to all the dimensions of effective development. The **inclusive development** commentary tends to focus on results in relation to participation, for example, rather than strategies used by the activities to address exclusion. In a few cases, activities acknowledged that there was not an intentional focus on or control of inclusive development.

Inclusive development outcomes have not been an explicit focus of the programme. The programme is focused on building the capacity of Pacific partner governments to reduce the risks and impacts from pest and disease outbreaks. MPI keeps track of the gender make–up of trainees, although the reality is that Pacific biosecurity agencies tend to attract a predominantly male workforce.

Enhanced Pacific Biosecurity Partnership, Activity Monitoring Assessment 2022–2023

The ultimate beneficiaries of the programme are farmers who benefit from access to a wider variety of seeds and planting materials that are also more resilient to adverse impacts of climate change. However, the programme is one or two steps removed from farmers, as it is working primarily at the policy and systems level. The programme does not determine which farmers get access to planting materials or participate in field trials / evaluations, as this is the realm of the Ministries of Agriculture in the programme countries.

Pacific Seeds for Life, Activity Monitoring Assessment 2021–2022

While it is acknowledged that in the case of these two activities, and other activities, the limited control over inclusive outcomes is a reality, there is a missed opportunity for the activity to adopt a more integrated approach to inclusive development and address system and institutional barries to inclusion as part of the activity.

Generally, commentary on **resilient development** in activity reporting shows that the link between the activity and preparedness and resilience is clear. Commentary on **sustained development** tends to assume that institutional and system development and capacity development is a foundation for lasting progress, with limited focus on how these can be sustained over the long term and after the investment ceases.

Sustainability

Sustainability is a key challenge for development programmes in the Pacific and for Samoa. Factors such as its geographic isolation, reliance on a tourism industry that is cyclical and is itself subject to external shocks, climate change impacts, pandemics and natural disasters, combined with resource and capacity constraints mean that Samoa will require continued donor support.

While the Samoa Programme has a focus on sustainability through developing the enabling environment, infrastructure, health and education systems and human capital, there is still a need for ongoing support and development.

5.2 Budget support

Key findings

- Budget support has been effective in providing emergency relief, support for one–off needs, institutional reform and sector development
- The modality is preferred by Samoa, enables locally–led development and is responsive and flexible
- The value of New Zealand's investment has been significantly increased by leveraging other donor investments through the JPAM arrangement
- Budget support could benefit from greater use of technical assistance, particularly with implementation
- It is a key focus of the partnership relationship and provides opportunities for closer engagement by Post

Programme delivery

In 2023–2024, total reform–linked budget support from all donors implemented through the JPAM totalled USD45.5 million, of which New Zealand contributed USD4.2 million (9.2%). Table 10 shows the total and percentage contribution from donors (excluding commitments for contingencies and emergencies).

Table 10 – Reform–linked budget support, 2023–2024

Donor	USDm	%
Australia	17.0	37.4
New Zealand	4.2	9.2
Asian Development Bank	7.5	16.5
European Union	6.8	14.9
World Bank	10.0	22.0
Total	**45.5**	**100.0**

Large value budget support activities funded during the period 2018–2024 are shown in Table 11 and include reform–linked budget support, emergency support (COVID–19) and sector budget support (education). These key activities totalled NZD99.6 million representing 38.6% of the Samoa Programme expenditure and this figure only includes large value budget support activities.

Table 11 – Key budget support activities

Activity	Purpose	Value NZDm	%
Samoa Emergency Budget Support 2022–2023	Supplementation	24.0	24.1
Supporting Economic Reform 2021–2024	Reform–linked	21.0	21.1
Samoa Covid–19 Resilience Fund	Supplementation	20.0	20.1
Samoa Education Sector Support 2020–2024	Sector development	12.7	12.8
Samoa CHOGM Support	Supplementation	11.9	11.9
Incentivising Economic Reform 2018–2021	Reform–linked	10.0	10.0
Total		**99.6**	**100.0**
% of Samoa Programme			38.6

As activities utilise GoS systems and processes, their effectiveness is largely reliant on systems and processes outside the influence or control of donors. While this is seen to be a strength of budget support as it enables Samoa to own and build its institutional and governance arrangements, feedback to the evaluation suggests there is scope for Samoa to access more technical assistance to support this.

While emergency budget and CHOGM support was primarily supplementation, the reform–linked and sector budget support activities were associated with specified outputs. The Education Sector Support Programme experienced some challenges in programme delivery relating to coordination, capacity and reporting and as a result programme delivery is seen to be mixed. For reform–linked budget support, the JPAM arrangement ensures a focus on delivery through progress review and release of payments.

Using the collective support of donors, reform–linked budget support has successfully completed numerous key reforms over the period across a range of areas including legislation, policies, strategies and institutions to improve and strengthen Samoa's regulatory and policy environment as well as improve social protection and responsiveness to emergencies such as COVID–19. Examples include:

- systems such as the Tax Invoice Monitoring System to improve Samoa's revenue generating capability and Automated Transfer System, which allows for automatic payments between banks
- institutional arrangements such as the establishment of the Samoa Competition and Consumer Commission and the Debt Management Division
- legislation such as the National Digital Identification Act and amendments to the Labour and Employment Relations Act to reduce discrimination against women in the workplace (among other reforms)
- policies and strategies such as the Financial Inclusion Strategy, Payment System Oversight Policy, Fixed Asset Management Policy Framework and the National Disaster Risk Management Policy 2024–2034.

Funding modality

The budget support modality is a preferred and priority funding modality for Samoa which balances locally–led development with donor requirements for performance accountability, provides a flexible mechanism for rapid response to emergency or one–off needs and can address broader priorities. As such it is an effective and appropriate modality for these needs. Capacity at the local level is a key challenge and may require more attention to the mobilisation of technical assistance to manage workloads while building the requisite institutional capacity.

Bilateral relationships

Feedback from stakeholders indicated that Samoa values budget support – it respects Samoa's preference for this modality and provides critical support when needed. The JPAM arrangement provides a practical mechanism for donors to engage with Samoa in open dialogue on policy reform and national and sector priorities – a process which contributes to strengthening and deepening bilateral relationships.

> . . . we have JPAM, a main cornerstone of Samoa's approach to aligning its priorities. That process is very strong . . . the depth of the relationship is there. The dynamics have grown. We appreciate that we are being challenged. We appreciate that we have a unique relationship with NZ. There is so much respect on the NZ side. We're not just talking about countries; we're talking about the Pacific. We share the Pacific, this big blue Pacific Ocean.
>
> GoS agency head

Leveraging investments by other donors and development partners

This is a key feature of the budget support modality, particularly reform–linked budget support which brings together the investments of New Zealand, Australia, the World Bank, ADB and EU. In 2023–2024, New Zealand's commitment of USD4.2 million was pooled with other donor commitments to achieve a total commitment of USD45.5 million. The synergies created by this pooled funding enable a significantly broader scope of reform activities than would otherwise have been possible with New Zealand's commitment alone. Similarly, the sector budget support activity in the education sector pooled investments from New Zealand and Australia to broaden the scope of this activity.

4YP outcomes

In the **short–term**, budget support was directly focused on implementing policy reforms and COVID–19 recovery. Emergency budget support, as supplemental support, provided critical support to Samoa's economy when it was severely affected by COVID–19 impacts on its primary revenue sources (tourism and remittances). The support also contributed to reducing Samoa's level of debt stress. By the end of the period, the economy had recovered, showing an annual GDP growth of 9.5% to June 2024 and had returned to pre–COVID levels. Revenues increased due largely to the recovery of the tourism industry and increases in remittances, and the budget was in surplus. Government debt as of June 2024 was WST796.6 million compared to WST946.8 million in June 2022. Though New Zealand's budget support was small compared to Samoa's GDP, it nevertheless contributed to its recovery and will have longer–term benefits.

The short–term policy reform outcomes are evident in the improvements to Samoa's policy and regulatory environment in terms of policies, legislation, systems and institutions, and in outcomes such as improved access, integration and protection, and in the quality and accuracy of reporting.

Budget support focused on **medium–term** outcomes related to stronger institutions and effective governance. However, as the support focused on foundational elements, the full benefits will take some time to be realised in terms of the strength of Samoa's institutions and governance and its economic and institutional resilience.

ICESD principles

Budget support activities are consistent with **effective development** principles particularly as they were based on strong partnerships and processes for dialogue, accountable and outcomes–focused. The broad scope of budget support ensured **inclusive development**. It included policy reforms that were inclusive, including specific reforms that addressed inequality such as the amendments to the Labour and Employment Relations Act**.** The education sector budget support activity included a strong focus on inclusion, particularly the needs of disabled students. As the focus of budget support was strengthening the resilience of Samoa's economy and institutions, these activities were directly addressing **resilient development**. Notwithstanding the observations below on the sustainability challenges, budget support, with its locally–led approach and focus on building the foundation for strong institutions and governance, addressed **sustained development**.

Sustainability

Samoa will need continued support due to its low resource base and vulnerability to economic shocks and natural disasters. However, the approach taken with budget support addressed sustainability by focusing on establishing and strengthening the foundations for its resilience to future shocks. There will always be a need to continue the reform agenda, such as in new priority areas, or to refresh and maintain implemented reforms or to respond to emerging priorities, and the sustainment and development of institutional capacity will be an ongoing need.

5.3 Support for CHOGM

Key findings

- The support for CHOGM activity successfully delivered its planned outputs despite the short lead time for planning and preparation
- The activity achieved several outcomes, including contributing to Samoa's successful hosting of CHOGM 2024 and strengthening institutional linkages and relationships between Samoan agencies as well as between Samoan and NZ Inc agencies
- The activity used significant administrative resources due to its complex procurement and contracting requirements

Programme delivery

The planned outputs for this activity were effectively delivered and contributed to Samoa's successful delivery of CHOGM 2024. The funding to Samoa was delivered through a Grant Funding Agreement (GFA), which is a proven and effective funding mechanism for direct in–country investments, and New Zealand counterpart agencies (NZ Inc) were funded through invoices to NZ MFAT. Support provided included advice and assistance with planning and coordination, exercises, capacity building and supplementation of resources (staffing and equipment). In relation to supplementation, this support was significant, needed and appreciated. For example, NZ resources were able to significantly increase the available ambulances and paramedics for CHOGM, with the number of ambulances increasing from 5 to 10. However, delivery of the activity faced some significant challenges, including:

- the short lead time for planning, preparation and delivery
- the large number of contracts in place (39), including some high value complex contracts, required significant administrative resources for procurement and contracting
- the need for contract variations to respond to changing delivery contexts
- the need to resolve indemnity and insurance arrangements for NZ Inc agencies operating in–country.

Despite these challenges, the activity was able to deliver the planned support effectively.

Funding modality

The support was delivered through budget support to Samoa and contracting of NZ Inc agencies which were appropriate modalities for the requirement. The use of budget support was a responsive and flexible modality for this one–off need, which New Zealand was able to use due its confidence in Samoa's systems and processes.

Bilateral relationships

Samoan agency stakeholders appreciated the partnership approach used by NZ Inc agencies, whereby New Zealand personnel worked with, and side–by–side with, counterpart Samoa agency personnel. This was seen to enable NZ Inc personnel to develop a good understanding of the organisational context and needs, anticipate the required support and capacity building and provide practical assistance to counterpart agencies. The support reinforced the strong partner relationship between Samoa and New Zealand and strengthened institutional linkages between Samoan and New Zealand agencies.

> The biggest impact of the support is the long–term relationships that were built through working together on CHOGM, due to the close ties we have with NZ and the people–to–people links.
>
> GoS stakeholder

These linkages were seen as important for local agencies as they provided opportunities to continue to engage post–CHOGM on development needs and challenges and to access further support and advice. For one agency in Samoa, New Zealand's support catalysed relationship building and coordination between agencies in Samoa, which has continued post–CHOGM.

> NZ actually helped us to build relationships with other agencies, where we had jurisdictional barriers and turf issues. We had good coordination with other government agencies [during CHOGM] because of the support from New Zealand which continued post–CHOGM.
>
> GoS stakeholder

Leveraging investment by other donors and development partners

Although other donors supported CHOGM, including Australia, New Zealand's support was provided separately, and focused on specific areas not covered by other donors and did not require coordination or collaboration with other donor activities. Given the short lead time for planning and preparation and the nature of the support, there was limited scope or potential for integration or achieving synergies in the provision of the support.

4YP outcomes

The CHOGM support activity had very specific outcomes tied to an immediate practical need, particularly in relation to the movement of a large number of visitors and related border control and security requirements, and it contributed to the smooth running of CHOGM 2024. The support it has contributed to other outcomes beyond the provision of support that have broader and longer–term benefits for Samoa and which are closely aligned to the 4YP outcomes, such as:

- **STO7:** Strengthened institutional linkages and policy exchange between New Zealand and Samoan agencies for painga kōtahi (mutual benefit), including on security and the movement of people
- **MO3.3:** Samoa's security is strengthened and its sovereign interests are protected.

ICESD principles

The support for CHOGM activity achieved **effective development**. It was delivered through a strong partnership approach at all levels, particularly the partnership between Samoan and New Zealand counterpart agencies, and delivered outputs that directly contributed to the successful hosting of CHOGM 2024. As the activity was focused on the security and safety of all Samoans and CHOGM delegates using all available Samoa and New Zealand agency personnel it ensured **inclusive development**. The activity addressed **resilient development**. It strengthened agency capabilities for planning, coordination and emergency response, which in turn strengthened event–specific resilience as well as resilience to manage future significant events and emergencies. As an activity supporting an immediate one–off need, **sustained development** would not have been a priority, however the approach taken also focused on sustainability, which is discussed below.

Sustainability

Although the support responded to an immediate need, the approach contributed to sustainability through its strong focus on institutional capacity building and an approach based on 'doing things with them' rather than 'doing things for them'. This ensured that the capabilities developed for CHOGM are transferable to ongoing operational needs and future significant events and emergencies.

5.4 Cocoa agriculture development

Key findings

- The activity was effective in achieving its deliverables, despite COVID–19 delays
- Production quality has improved to meet export standards
- The Recognised Seasonal Employer (RSE) and Pacific Australia Labour Mobility (PALM) schemes impacted workforce availability

Programme delivery

Support for cocoa agriculture development was delivered through the three activities listed in Table 12.

Table 12 – Cocoa agriculture development activities

Activity	Implementing Partner	Expenditure NZD
Improved Livelihoods Cocoa Samoa, 2020–2024	SPS Biosecurity	888,38
Samoa Cocoa Industry Development Initiative, 2017–2023	The AgriChain Centre	3,914,889
Samoa Cocoa Export Improvement Programme		80,638

The Samoa Cocoa Industry Development Initiative aimed to increase the production and quality of product and focused on four key outputs:

- establishing the Samoa Koko Industry Association (SKIA)
- establishing a model grafting nursery and distributing plants
- providing on–farm training
- developing post–harvest processing practices.

The Improved Livelihoods Cocoa Samoa activity aimed to develop the cocoa value chain and focused on four key outputs:

- improving production through training and distributing plants
- developing the Savaii promotion plan, including the Pacific Cacao and Chocolate Show
- developing and implementing biosecurity and disaster risk management plans
- providing youth training.

Information on the Samoa Cocoa Export Improvement Programme was available for the evaluation.

Although implementation of the two larger activities was impacted by COVID–19, broadly the activities were able to achieve outputs although adjustments to timeframes and delivery mechanisms were required.

Funding modality

For the two main activities, specialist New Zealand firms were engaged as implementing contractors and delivery was supplemented by partners in New Zealand and Samoa, such as Massey University and SCCI. The Samoa Cocoa Industry Development Initiative also included collaboration with the Samoa Ministry of Agriculture and Fisheries (MAF), particularly in relation to the use of land controlled by Samoa Trust Estates Corporation (STEC) for nurseries.

Given the requirement for specialist technical expertise and the potential for export to New Zealand manufacturers, the implementation contractor modality was appropriate for the requirement.

Bilateral relationships

Although opportunities for strengthening bilateral relationships at the ministry level were limited, the activities provided opportunities to strengthen bilateral relationships at the organisational level, particularly through links between growers and the grower's association with technical organisations and universities.

Although SKIA did not engage directly with growers' associations in other countries, the organisation has expressed an interest in engaging internationally at this level. The short– and medium–term outcomes for this activity were met effectively, particularly in terms of revitalising the cocoa industry in Samoa.

Leveraging investment by other donors and development partners

While the activities did not directly leverage investments by other donors, where possible and feasible they linked with other partners including working through the New Zealand–based Grow Asia Pacific Charitable Trust to link with New Zealand manufacturers and utilising the training platform hosted by Wintec (New Zealand Institute of Skills and Technology) and using University of the South Pacific (USP) trainers. Another example was the partnership with UNDP and MAF to provide training to youth interested in cocoa farming.

4YP outcomes

Cocoa agriculture development activities relate directly to growing Samoa's private sector (SO1.2) which contributes to Samoa's economic growth (MO2). The activities have been successful in achieving short–term outcomes which contribute to the 4YP outcomes, including:

- establishing SKIA
- farmers utilising improved farming practices
- achieving increasing earnings from cocoa
- expanding export market share.

Samoa Koko Industry Association

The establishment of SKIA was a significant achievement. SKIA's 134 members provide an integrated voice for cocoa agriculture, including other agriculture farming associations in both Savaii and Upolu and other in–country organisations directly or indirectly involved in the cocoa value–chain. It plays an important role in linking, networking, organising and advocating for the development of cocoa agriculture. SKIA envisages that it will extend this network globally to increase the potential for export of cocoa.

SKIA has a functional capacity with the secretariat and administrative support provided by SCCI on a fee for–service–basis. Although the activity was completed in 2023, the establishment of SKIA provides the basis for continued development of the industry under SKIA.

Improved farming practices

Farmer training on improved farming practices contributed to better farm management and productivity in the long term.

> There is a lot I have gained from the training. In the past when we would prune or take care of the koko, we would use the machete which would take other parts of the tree. But when we received tools from the training the gardening scissors and tools saves the plant and easier for us to look after the koko. Every month we check on the plants, it is easier to prune small branches. But when we used machetes, if we cut the small branch sometimes, it scrapes part of the tree and that affects the growth of the plant too.
>
> Samoa cocoa farmer

Cocoa earnings

There were some challenges in measuring the improvement in earnings due to inconsistencies between Central Bank of Samoa data, data collected by other agencies, activity data and farmers' own data. Other challenges included the impact of price fluctuations. While growers may be pleased with increased earnings when prices are high, without data on productivity (such as yield per hectare and input costs), it is difficult to measure the impact of improved seedlings and farming practices on earnings. Another challenge was the dynamic between the domestic price of cocoa paste (*koko Samoa*) and export prices, particularly as *koko Samoa* is sold as an informal export to diaspora Samoan communities, and neither domestic nor export sales of *koko Samoa* are measured. Feedback to the evaluation indicates that growers may prefer to sell *koko Samoa* domestically or as an informal export as it can achieve a higher price. One farmer described his earnings from sending a shipment of *koko Samoa* as an informal import.

> . . . we sell our koko, say 80 cups if we sell it to America for example . . . through Pacific Express and it costs 220 tala to send the koko and we get about 3,000 tala from the 80 koko cups we sell.
>
> Samoa cocoa farmer

The activities did face challenges that impacted their delivery, including:

- COVID–19 had a considerable impact on the progress of the activity, particularly in terms of re–scheduling deliverables and using alternative and remote arrangements for advisers and trainers
- delays caused by a lack of access to government–owned land during general elections
- farm labour shortages due to workers participating in the RSE and the PALM schemes.

Export market share

As a result of these activities, new export opportunities were developed – with Whittaker's Chocolates and OCHO (Otago Chocolate Company) – although data on export sales is limited and often based on estimates. OCHO is currently advising that it is unable to access cocoa from Samoa[16]. The improved livelihoods activity reported that 48 tonnes of beans were exported between July 2021 and June 2022, compared to a baseline of 30 tonnes. As export volumes and prices are important measures for these development activities, data collection will need to be improved.

ICESD principles

Cocoa agriculture development activities addressed **effective development** through their focus on outcomes and approach to partnering with growers, Samoan organisations and MAF. **Inclusive development** was an important feature of these activities. The activities ensured coverage across Samoa, inclusion of smallholder farmers and targeting of women and youth in training activities. The industry development activity also supported the formation of the Samoa Women's Association of Growers (SWAG), and a SWAG member is on the board of SKIA.

Despite this, there were some equity issues in the delivery of the activities stemming from differences in the quality and pricing of plants from different nurseries and ownership and capability of the two fermentation, drying and storage facilities. A stakeholder consulted for the evaluation also suggested the need for clarity about the process to manage cooperation and competition in the industry, as it develops, both domestically and internationally.

The activities have taken a comprehensive and systemic approach to industry development and focused on essential components across the value chain. This will contribute to industry growth over the long term and is consistent with **resilient development**. The achievement in establishing SKIA was a strong example in fostering local ownership and control of the industry which is important for **sustained development.** However the industry will need continued support over the long term, which is discussed below.

Sustainability

Continuing the benefits realised through these activities will need a focus on sustainability, which has not been built into the existing activities. This includes ensuring that new farming practices are continued, production quality and output are maintained and increased, SKIA's momentum is continued and its development plans resourced and export market share is retained and expanded.

5.5 Private sector development

Key findings

- Activities adapted to the impacts of national health emergencies and achieved intended outputs
- Activities focused on developing key foundational elements for private sector growth, particularly in the enabling environment and in identifying market opportunities
- Valuable and needed direct support was provided to individual businesses in Samoa
- The investment was delivered through multiple New Zealand–funded activities and in the context of a large number of other donor–supported private sector development activities, with limited cohesion and coordination

Support for private development was delivered through the three activities listed in Table 13 although support related to private sector development was also provided in areas such as tourism development, cocoa agriculture development and infrastructure.

[16] https://ocho.co.nz/blogs/blog/meet–ocho–founder–liz–rowe?_pos=1&_sid=4fc62b017&_ss=r

Table 13 – Private sector development activities

Activity	Geographic focus	Implementing partner	Expenditure NZDm
Private Sector Development Programme	Samoa	Palladium	7.6
Business Link Pacific Phase I	Pacific including Samoa	DT Global	1.7
Business Link Pacific Phase II	Pacific including Samoa	DT Global	0.8
Market Development Facility[1]	Pacific including Samoa	Palladium	1.2

Note 1: New Zealand and Australian co–investment

The largest activity by value, the Private Sector Development Programme (PSDP), focused on strengthening the private sector enabling environment and providing direct support to micro and small businesses (business advice, training and financing) through core funding provided to the Samoa Business Hub (SBH). The BLP targeted established businesses and provided business advice and financing, as part of a regional programme delivered to eight Pacific countries. The MDF supported private sector development by identifying business opportunities for countries in the Asia–Pacific region including five Pacific countries. In Samoa, this is focused on agriculture, kava, feral pig control, agricultural mechanisation, agricultural inputs and cocoa.

Like other activities, implementation of these activities was impacted by COVID–19, and despite this the activities were able to achieve outputs through adjustments to timeframes and delivery mechanisms.

Funding modality

The activities were delivered through implementation contractor arrangements, and in the case of BLP and MDF, a single managing contractor for the multi–country activity. Implementation contractor arrangements with international firms, including for regional facilities, are a proven and effective and efficient modality that leverages the contractor's knowledge and systems, built through global experience. In addition, for the multi–county BLP and MDF activities, the regional approach provides additional benefits through integration and streamlining across countries.

Bilateral relationships

Although the BLP and MDF, as regional activities, provided limited opportunities to strengthen bilaterial relationships, the PSDP activity provided opportunities for strengthening bilateral relationships at the ministry level, as well as the organisational level through working with local organisations, including SBH and SCCI.

Leveraging investment by other donors and development partners

While PSDP did not directly leverage investments by other donors, MDF is a co–investment with Australia and this pooling of funds brought benefits in terms of the scope and effectiveness of activities delivered through the activity.

However, the Samoa Programme's private sector development activities are delivered within a complex ecosystem of development support, including other multi–country activities supported by New Zealand, such as PHAMA Plus and PACER Plus, that address private sector development needs, as well as other donor activities. This creates challenges for Samoa Programme activities, including coordination, integration and coherence.

4YP outcomes

Private sector development activities relate directly to the 4YP short–term outcome SO1.2 (positioning the private sector for growth).

Through the MDF, business growth opportunities were identified and developed, including kava. In this case, MDF is working with kava producers to improve product quality and increase export income and this work is ongoing. The activities delivered by BLP and PSDP in relation to direct support to businesses through business advice, training and financing have been successful in achieving short–term outcomes, particularly in terms of strengthening individual businesses and facilitating access to financing to enable business growth and expansion.

In addition to the provision of business advice training and financing to Samoa's micro and small businesses, the PSDP delivered the following outputs, which have strengthened Samoa's private sector enabling environment:

- development of the Micro, Small and Medium Enterprises Development Policy
- development of the National Industry Development Policy and Strategy
- development of the Guide to Private Sector Development Programs in Samoa
- review of the Development Bank of Samoa's pilot microfinance scheme
- completion of a scoping study for Samoa's Innovation and Technology Park
- development of case study material for SBH, including video and print materials
- development of SCCI's Strategic Plan 2021–2026
- capacity building for staff of SBH and the Development Bank of Samoa.

These outputs directly contributed to positioning Samoa's private sector for growth through strengthening the Ministry of Commerce Labour and Industry (MCIL) policy and regulatory framework, building SCCI's capability as the private sector peak body, developing the SBH's capacity and providing guidance and resources for the sector.

ICESD principles

The private development activities had a strong focus on achieving their planned outcomes which is consistent with **effective development** and in delivering activities worked closely in partnership with agencies, industry bodies and local businesses. In delivering direct support to businesses, between PSDP and BLP there was an appropriate focus on both small and emerging business as well as established businesses, which is consistent with **Inclusive development**. The activities had a strong focus on GEDSI and collected disaggregated results as part of their monitoring and evaluation. As the activities were designed to contribute to sustainable economic growth and ultimately economic resilience, they were consistent with **resilient development**. The focus on strengthening the private sector private enabling environment was important for **sustained development** as was supporting the institutional strengthening of key support organisations such as SBH and SCCI.

Sustainability

The private sector is a dynamic sector and is influenced by fluctuations in economic and environmental conditions, is subject to domestic and international competition and needs to be adaptive to changing technologies and consumer behaviours. As the sector is only just recovering from COVID–19 impacts and is targeting improvements in productivity, exports and employment, the need for support remains. While organisations such as SBH and SCCI have been strengthened, they are not yet well–positioned for these roles without additional support, particularly as SBH targets emerging and small businesses with limited resources to pay for services.

6. Efficiency

Key evaluation question

How well have the Samoa Programme human, financial and other resources been used, particularly in relation to cost, operational and time efficiency?

This section focuses on the efficient use of resources, particularly in relation to the funding and delivery modalities used and consideration of challenges faced by the Samoa Programme in relation to efficiency. The focus on efficiency is high–level and reports our general observations about efficiency. As we have not accessed or reviewed detailed cost data on the Samoa Programme overall or on individual activities, we are not able to provide a detailed assessment of efficiency of human and financial resources, or to benchmark the Programme or individual activities.

6.1 Overall findings

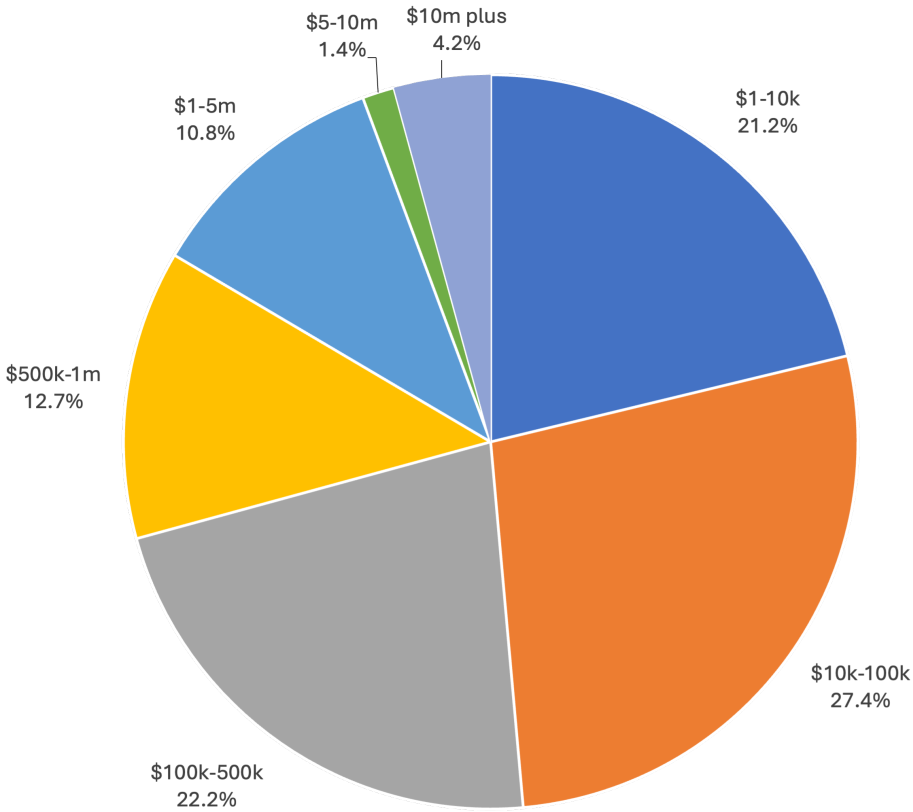
Overall key findings

- The Samoa Programme includes a large number of very small value activities, and a small number of very large value activities
- The Programme makes good use of efficient funding and delivery modalities such as budget support, multi–country activities and co–investment in regional organisations and programmes
- There are some opportunities to adopt a more strategic or programmatic approach to consolidate the number of activities and streamline and integrate delivery
- Activities adapted to COVID–19 disruptions to minimise impacts on delivery.

Number and value of activities

The number of activities delivered under the Samoa Programme is an important consideration for efficiency. Of the 215 activities, nearly half were valued NZD100,00 or less, and 16.4% were valued NZD1 million or more. Figure 15 shows the distribution of activities by value ranges. Although the average value of activities was NZD1.2 million, there are a large number of very low value activities and a low number of very high value activities, with 21.2% of activities valued at NZD10,000 or less, and 5.6% of activities valued at NZD5 million or more. Further information on activities by value ranges is included in Appendix F.

Figure 15 – Activities by value



A review of the number of activities delivered through other country programmes shows that the total number of activities delivered through the Samoa Programme is comparable with other country programmes of similar size.

Funding and delivery modality

This imbalanced distribution is in part explained by the mode of funding and delivery of activities. The **Embassy Fund** supported 61 local organisations for a total value of NZD788,138, with an average value of $12,920. While administering a large number of low value activities may be less efficient, in terms of promotion, assessment, selection, contracting and reporting, these investments are effective and their value has been discussed in the previous section.

There are 12 activities valued at over NZD5 million, with a total value of NZD172.2 million, with an average value of NZD14.4 million. These activities represented 66.8% of the total Samoa Programme expenditure. These activities are shown in Table 14.

Table 14 – Activities valued over NZD5 million

Activity	Type	Expenditure NZDm	%
Samoa Scholarships	Scholarships	30.0	17.4
Samoa Emergency Budget Support 2022–2023	Budget support	24.0	13.9
Supporting Economic Reform 2021–2024	Budget support	21.0	12.2
Samoa Covid–19 Resilience Fund	Budget support	20.0	11.6
Samoa Education Sector Support 2020–2024	Budget support	12.7	7.4
Samoa CHOGM Support	Budget support	11.9	6.9
Incentivising Economic Reform 2018–2021	Budget support	10.0	5.8
Samoa–Aotearoa NZ Country Flexible Finance	Flexible grant	10.0	5.8
Savalalo Market Rebuild	Infrastructure grant	10.0	5.8
Samoa 2023 Tertiary Scholarship	Scholarships	7.7	4.5
Private Sector Development Programme	Managing contractor	7.6	4.4
Strengthening Primary Health Care Across Samoa	Co–investment	7.3	4.2
Total		**172.2**	**100.0**
% of Samoa Programme			66.8

The highest value activity was related to the **Scholarship programme** with a value of NZD30.0 million, and the Scholarships programme had another high value activity (Samoa 2023 Tertiary Scholarships), which had a value NZD7.7 million. All Scholarship activities in the Samoa Programme totalled NZD 44.4 million, which was 25.8% of the Samoa Programme expenditure. As scholarships are delivered through New Zealand's scholarship management infrastructure (Education New Zealand), these activities can take advantage of economies of scale and achieve cost–efficiencies through these delivery arrangements.

There were 6 **budget support** activities in this value range, including reform–linked and sector budget support, with a total value of NZD99.6 million, with an average value of NZD 16.6 million. These activities represented 38.6% of the total Samoa Programme expenditure. The budget support modality is very efficient in terms of administration, as it is based on direct funding to MOF, tied to policy or sector priorities, implemented through the GoS and monitored through the JPAM arrangement.

The four other high value activities were also delivered through efficient modalities. The Samoa–Aotearoa NZ Country Flexible Finance activity was a NZD10.0 million grant managed through GoS systems and processes. The Savalalo Market Rebuild (NZD 10.0 million) was managed through Samoa's national procurement system, with contracts for services related to design and construction procured through the Samoa Tenders Board system. The Strengthening Primary Health Care Across Samoa activity was a NZD 7.3 million co–investment with the World Bank that leveraged the Samoa Health System Strengthening Program–for–Results (PforR) programme. The Private Sector Development Programme (NZD7.6 million) was delivered through a managing contractor. Each of these activities were delivered through arrangements providing opportunities to harness efficiencies from access to operational and delivery systems and processes.

There were 115 activities with an expenditure value of more than NZD10,000 and less than NZD5 million. This represented 73.2% of activities with an average value of NZD737,391. These activities used a wide variety of modalities, including co–investing in regional organisations and programmes, contracting implementation partners, the Scholarships programme and Embassy Fund grants. The opportunities for efficiencies in the Scholarships programme and co–investments discussed above can apply here, as does the need to balance the effectiveness of the Embassy Fund grants with their administrative requirements.

Delivery through implementation contractors and regional organisations or programmes can be efficient, particularly for less complex activities, due to factors such as:

- leveraging specialist or technical expertise to enable activities to 'hit the ground running'
- leveraging existing knowledge, networks and relationships
- using outcomes– or deliverables–based contracts.

Project and programmatic focus

The management of a portfolio of 215 separate activities has resource implications in terms of design, procurement, contracting and reporting, and the use of modalities such as budget support, scholarships and co–investment makes efficient use of resources. Adopting a programmatic focus, where feasible can also contribute to efficient use of resources (and effectiveness) through streamlining and integration. Discrete projects have an important role, for example for local and community grants through the Embassy Fund, for rapid responses to urgent or unplanned needs, and for scoping, prototyping and testing interventions. However, there are examples of activities that have been delivered as discrete projects that may have been delivered as part of a single programmatic activity with separate components. Examples include:

- multiple activities in a sector or industry (for example transport, cocoa agriculture, tourism, the private sector and climate change)
- multiple phases of an activity (for example BLP)
- activities that evolve into new activities (for example the Enhanced Pacific Biosecurity Partnership which was followed by the Pacific Market Access programme with a related though separate focus).

It is acknowledged that some of these activities are delivered as multi–country activities, which limits the Samoa Programme's opportunities for programmatic delivery.

Samoa has national sector plans covering 14 sectors, and clear processes in place for programming in relation to these plans, and this provides a framework for developing a strategic or programmatic approach to the design and delivery of activities. This will enable some consolidation of administration and improve integration and effectiveness.

This is not to say however that opportunities for programmatic delivery have not been pursued, and this is being reflected in the approach to private sector programming that is currently underway.

Efficiency challenges

COVID–19 presented significant challenges to the delivery of Samoa Programme activities, and overall, this disruption was well–managed at all levels to minimise delays in the delivery of outputs. While not ideal, the use of alternative (including remote) delivery mechanisms ensured continuity of activities despite the inevitable delays.

Although there are efficiencies to be gained through using systems and processes of implementing partners, whether they be GoS agencies, regional organisations, donors and development partners or implementation contractors and partners, there will be inefficiencies in these systems and processes that the Samoa programme will not have control over and that will impact the efficiency of activity delivery. This can include delays in processing and decision–making, delays and challenges in recruitment and procurement, and timeliness and quality of reporting, many of which relate to internal capacity limitations. This suggests the need for greater consideration of institutional strengthening for implementing agencies and partners as part of activity design and delivery.

> The timely submission of sector work–plans, budget, and reports to the Advisory Committee is still an issue. Delayed submissions from the Implementing Agency (IA) to the Sector Coordination Division is the main challenge to timely sector reports. The Coordination Division is only resourced with six people which is often insufficient to meet turnaround times when other Ministry projects and priorities arise. Going forward, reporting times should be reviewed to consider capacity constraints within the Coordination Division and reporting staff across IAs. Further support, through technical assistance and / or training on strategic planning and reporting should be considered for IA staff to ensure accurate and timely reporting.
>
> Activity Monitoring Assessment

Noting these efficiency challenges, on balance these delivery arrangements represent an efficient mode of delivery.

6.2 Budget support

Key findings

- Budget support is an efficient, responsive and flexible modality
- Implementation capacity constrains progress in achieving reforms and sector development, and this impacts efficiency

As has been discussed in the previous section, budget support is an efficient modality for delivering investments of size and scale, particularly as the GoS aid coordination mechanism minimises potential duplication or overlap in sector investments and the JPAM arrangement provides a framework for pooling donor investments while coordinating and monitoring agreed priorities.

It is also a flexible and adaptable modality, and the ability of New Zealand to respond to emergency, emerging or one–off needs, such as support for CHOGM, is a key feature. Use of budget support reflects New Zealand's confidence in Samoa's systems and processes, and the strong partnership relationship between Samoa and New Zealand enables close dialogue and ongoing monitoring of progress to support implementation, adaptation and response to evolving needs and changing delivery contexts.

The budget support modality's reliance on GoS systems and capabilities leads to some inefficiencies, due to capacity limitations, both in terms of progress on reforms and in sector programmes. While the reform–linked budget support incentivises progress through the payment of instalments, there is scope to consider increased technical assistance to support progress. In the case of sector budget support, which has an implementation focus, local capacity constraints impact progress, and required an increased focus on delivery and performance reporting, which are both related to institutional capacity. As the modality's use in sector budget support increases, this will need to be addressed.

6.3 Support for CHOGM

Key findings

- The activity used funding and delivery modalities that were appropriate for the purpose and context.
- The mobilisation of NZ Inc support services was an efficient and appropriate modality for bringing together a diversity of technical support in a short timeframe and leveraging existing linkages and capabilities.

The support for CHOGM activity included several different components, with the NZ Inc technical assistance component spanning multiple agencies and involved mobilisation of personnel, supplies, uniforms, vehicles and equipment. In addition to logistics, mobilisation also included consideration of indemnity and insurance arrangements and interoperability in terms of standards and equipment.

The proposed budget for the activity is summarised in Table 15.

Table 15 – Support for CHOGM budget

Support category	Item	Expenditure NZD	Note
Funding to Samoa (GFA)	In–country investments including:	8,000,000	
	– Supplementary accommodation		GoS contribution up to NZD5m
	– Infrastructure – water / sanitation		
	– Accommodation booking system		
Technical support	Including NZ Inc mobilisation	2,000,000	
Contingency	For GoS contribution	5,000,000	
Total		**15,000,000**	

Note: The contingency represents funds held to cover the shortfall in GoS funding for the supplementary accommodation

Final expenditure on the activity was NZD11.9 million, which is well below the total budget but above the amount excluding the contingency. While a full breakdown of the expenditure was not available, given the complexity and short timeframe of the activity, the quality of support provided and the outcomes achieved, this is likely to have been an efficient use of resources, though noting the administrative challenges involved. The Activity Monitoring Assessment report for this activity notes that the actual expenses for the NZ Inc support are lower than budgeted, which suggests that the high–quality outputs were delivered efficiently. This is likely due to several factors, including:

- use of ‘standing’ internal specialist personnel and resources, rather than teams assembled through an external procurement process
- existing linkages and relationships between counterpart agencies
- careful planning and preparation, including scoping missions prior to mobilisation
- use of NZ Inc personnel with a Samoan background and the contextual knowledge and cultural competency to operate efficiently in–country

- use of a co–design / partnership approach that enabled support to be well targeted and appropriate.

While a GFA is an efficient modality for direct funding to Samoa, the complexity of the programme also necessitated a large number of separate contracts, which is less efficient.

6.4 Cocoa agriculture development

Key findings

- The implementation contractor modality enabled efficient use of resources
- Despite national health emergencies during the period, adaptive management minimised impacts on the achievement of results
- MAF resources were underutilised
- RSE and PALM schemes impacted workforce availability
- Delivery through multiple activities was a less efficient use of resources

The efficiency of the activities was impacted by COVID–19, and in the larger industry development activity an adaptive design approach was applied to the delivery, allowing it to revise outputs and to manage the evolving context in Samoa during this time. Other challenges which impacted the efficiency of this larger activity included:

- capacity constraints due to the absence of the in–country project manager and the requisite adjustment of the roles of team members
- the scheduling of the Samoa General Election in 2021 and its interruptions to agency participation in activities, including access to nurseries on STEC land
- reductions in available farm labour, particularly for larger farms, due to participation in RSE and PALM schemes, which impacted critical parts of the production cycle, such as harvest and processing.

The modality used in these activities (implementation contractors) is an efficient modality, which enabled specialist expertise to be mobilised quickly, building on institutional knowledge and research and harnessing relevant in–country and New Zealand partners for specific inputs based on local knowledge and networks.

The role of MAF in the activities did not take full advantage of its resources, with its existing nursery facility not favoured, and the activity instead established a separate new nursery which may not have been an efficient use of resources.

Cocoa agriculture development over the period 2018–2024 was delivered through three activities. The two activities reviewed in detail have distinct but overlapping objectives – each had outputs focusing on training, nursery plant production and distribution and market access. In some instances, the delivery of outputs involved inconsistent approaches between the two activities, such as nursery and farming practices, pricing and quality of plants and public / private control of nurseries and facilities.

From an efficiency perspective, cocoa agriculture development would have benefited from a strategic or programmatic approach, where a single programme with a system and industry view delivers components in an integrated, sequential manner. Such an approach could enable efficiencies through streamlining and other benefits and be more effective in achieving outcomes.

6.5 Private sector development

Key findings

- Modalities used in the delivery of activities enabled efficient use of resources within each activity
- Development support was delivered through three separate activities, and efficiencies could have been achieved through closer collaboration and coordination and a more cohesive and integrated approach

Delivery of activities through multi–country programmes provides an efficient mechanism for project delivery through economies of scale and utilisation of single systems and processes, which themselves can leverage the global resources of international implementation contractors. In addition, the multi–country approach can achieve efficiencies through integrated and streamlined practices, for example in relation to specific markets or commodities (MDF) or services (BLP) that are common to more than one country. However, to balance this, multi–country programmes need to pay attention to ensuring local relevance and visibility, and in the case of co–financed multi–country programmes (MDF) there is an additional focus on developing shared priorities. The evaluation did not receive adverse feedback in relation to these challenges. However, it was noted that as the multi–country programmes are managed by Desk, local engagement is limited compared to activities managed by Post, and coordination between Desk and Post can be improved.

Feedback from MCIL on the PDSP indicated that the activity was delivered efficiently, which was attributed to the support and commitment of stakeholders involved in the activity. With multiple local partners supporting the activity, there were challenges in relation to delayed reporting and payments, due largely to capacity constraints.

The 2019 measles outbreak and COVID–19 pandemic impacted progress on the timeframes for some components of the activity, such as the delayed consultations for the development of the National Industry Development Policy and Strategy. In response a Programme Approval Committee (PAC) was formed in 2019, which comprised SBH, MCIL, NZ MFAT and MOF, and focused on providing oversight of the work plan and ensuring timely decision–making and approval of deliverables. The committee also switched to regular online meetings to maintain commitment and continuity.

> . . . the commitment, flexibility and resilience shown by all partners were crucial in addressing these difficulties and maintaining the programme's effectiveness and integrity especially during lockdown times.
>
> GoS stakeholder

Despite these challenges, PSDP resources, including financial, human, and technical, were generally used efficiently to achieve intended outcomes and meet timelines.

Private sector development over the period 2018–2024 was delivered through three activities, and other Samoa Programmes had related and interconnecting private sector objectives. Two of the activities provided business advice and financing directly to businesses, though each targeted different segments of the sector. In addition, different approaches were used in the activities, two based on direct support and one based on market system development.

The multiple private sector development activities lead to inevitable confusion in the sector about the role and purpose of the different activities related to market access and direct support to businesses. This confusion has been exacerbated by the PACER Plus program (focused on the trade enabling environment), which is based in Samoa and which in its initial phase provided direct support to businesses in the form of materials and equipment.

Private sector development would have benefited from a programmatic approach informed by an overarching strategy, and this is currently being addressed through the development of a private sector development programme to provide a coherent and integrated approach to New Zealand's investment in the context of the complex private sector development ecosystem in Samoa.

7. Lessons learned and future directions

Key evaluation question

What are the key learnings and areas of improvement that can inform ongoing management and outcomes of the Programme, and its future development (shape)?

7.1 The Samoa Programme

Lessons learned

Strong planning frameworks

The Samoa Programme is closely aligned to Samoa's needs and priorities, and this results from Samoa's planning framework, which provides clear direction at the national and sector level, and to New Zealand's programming of its Samoa investments.

Effective partnerships

The successful development and implementation of the Samoa Programme is due to a large degree to the strong partnership between Samoa and New Zealand at all levels – in planning the Programme and in the design and delivery of individual activities.

Emerging priorities

Security and climate change are increasingly important in the region and for Samoa and the Programme has responded to these emerging needs. These priorities are more clearly reflected in Samoa's current national plan and the Samoa Country Plan. In each case there are clear connections with other priorities, particularly for climate change which is a cross–cutting theme. Security is tied to strong institutions and governance, economic resilience and social well–being, and so broadly these emerging priorities have been addressed, although the links are not well drawn out. This is discussed further as an area for improvement.

The outcome of the 2025 national election may result in some adjustments in Samoa's national development priorities and if this is the case, these will be addressed in discussions to agree the programming directions for the Samoa Country Plan.

Diverse and effective modalities

The Samoa Programme has a range of funding and delivery modalities, each of which can provide benefits appropriate to specific activities in terms of responsiveness, flexibility, adaptability and accountability. The use of different modalities has been fit–for–purpose for the need and context.

Breadth of activity

The Samoa Programme investment is spread across a large number of activities, which provide broad coverage of needs at the national and local levels and across stakeholder groups. This has been important for the visibility of the Programme and in strengthening relationships at all levels across Samoa. The Embassy Fund small grants, in particular, though administratively intensive in comparison to the total value of this investment, are effective for this purpose. In other areas though, there are opportunities to consolidate the breadth of activities which are discussed as an area for improvement.

Adaptability

The Programme was able to deliver its planned outputs during a period that was impacted by two national health emergencies and without significant diminution of results, reflecting the adaptive approach used in many of the activities and in the Programme overall.

Areas for improvement

Addressing goals and outcomes

Activity data provided to the evaluation does not enable mapping of activities to 4YP goals and outcomes. Consideration could be given to strengthening this in activity documentation and reporting to enable measurement of the alignment of individual activities with Samoa Country Plan goals and outcomes.

> *Recommendation 1*
> *Consider improving activity documentation and reporting to enable the measurement of activity alignment to Samoa Country Plan goals and outcomes*

In addition, while activity documentation allocated investments to priority themes, the interconnected and cross–cutting nature of some themes makes it difficult to measure alignment for themes such as climate change, GEDSI and security, and consideration could be given to effective ways to capture these and other themes and priorities.

> *Recommendation 2*
> *Consider improving activity documentation and reporting to enable the measurement of activity alignment to priority themes particularly interconnected and cross–cutting themes such as gender equality, disability and social inclusion (GEDSI) and climate change*

Measurement of achievements

Although activity documentation provided information on the achievement of outputs and short–term outcomes, these are difficult to aggregate across the Programme. In the case of outputs, although activities may have used common types of outputs (for example development of legislative instruments or policies or delivery of training programmes), these are not aggregated across the Programme.

Measurement and aggregation of outcomes is more difficult than outputs and is made challenging by the absence of an overarching MERL framework for the Programme and the inconsistent approach to measurement. For example, not all activities had MERL frameworks, and where they did, not all indicators were measured. In activity documents, some activities used the 4YP outcomes, some used activity–specific outcomes and some used the outcomes of the multi–country programmes they contributed to.

One benefit of an overarching MERL framework would be the identification of common outputs and outcomes that could be aggregated for whole of Programme reporting, and for guidance on disaggregated measurement of results for cross–cutting priorities such as GEDSI and climate change.

> *Recommendation 3*
> *Consider developing an overarching monitoring, evaluation, research and learning (MERL) framework or guidance for the Samoa Country Plan that ensures consistency in the specification of outputs and short–term outcomes and supports aggregation of results including cross–cutting themes such as GEDSI and climate change*

A more strategic or programmatic approach

While the Programme took advantage of opportunities to use a strategic or programmatic approach to activities rather than individual projects, this opportunity was not fully utilised (for example in tourism, private sector and cocoa agriculture development activities) and could be considered in future programming.

> *Recommendation 4*
> *Pursue opportunities in future programming to use a strategic or programmatic approach instead of individual projects, where feasible and appropriate, including in cocoa agriculture and private sector development investments*

Focus on institutional strengthening

While some activities had a focus in institutional strengthening as an explicit component of the activity, the reliance on local agencies and partner organisations for elements of activity implementation, particularly where there were increased or complex reporting requirements, needs a greater focus in activity design and investment.

> *Recommendation 5*
> *Ensure that future activity designs provide resources for institutional strengthening and capacity development for local implementation partners*

Positioning for the future

The Samoa Country Plan continues the focus of the 4YP and reflects the updated priorities of the national development plan, particularly in relation to security and governance. As the broad focus and approach of the Samoa Programme over the period 2018–2024 was closely aligned with Samoa's national development, delivered in partnership with Samoa and emphasised the enabling environment and institutional strengthening, it is well–positioned to build on to deliver the Samoa Country Plan outcomes. The areas for improvement identified above and in the following sections provide directions for future programming of the Samoa Country Plan. In addition, several activities completed mid–term or final evaluations which provide activity–specific directions and recommendations which can inform future programming.

7.2 Budget support

Key learnings

Responding to a partner in need

Budget support has been used effectively to respond to Samoa's needs in a flexible and responsive manner that reflects the longstanding partnership relationship based on trust. This response includes significant commitments to emergency and one–off needs, support for reforms to its enabling environment and support to address sector priorities. The support is highly valued and needed by Samoa and has strengthened the partnership between the two countries.

A preferred and effective modality

The use of budget support respects Samoa's preference for this modality and has been an effective and efficient use of New Zealand's investments.

Areas for improvement

Extended use of budget support

Budget support is an efficient and effective modality that is suitable for use in sector development and there is potential to broaden its use for this purpose.

> ***Recommendation 6***
> *Explore opportunities to expand use of budget support for sector development using appropriate arrangements to support implementation, monitoring and performance reporting, accompanied by institutional strengthening and capacity development*

Capacity to progress reforms

While respecting Samoa's preference for locally–led development, the budget support could benefit from more effective use of technical assistance to progress reforms.

> ***Recommendation 7***
> *Consider providing additional technical assistance with budget support to enable institutional strengthening and capacity development to support reform progress and implementation of sector development*

Post engagement

As a key instrument for New Zealand's investment in Samoa and focus of the partnership, opportunities for increased Post engagement with reform–linked budget support and the JPAM arrangements could be pursued.

> ***Recommendation 8***
> *Take advantage of opportunities for Post to optimise its engagement with Samoa on its budget support investments, particularly in relation to the Joint Policy Action Matrix (JPAM)*

Positioning for the future

While significant progress has been made in reforms to Samoa's enabling environment, this need will continue as part of the maturation of Samoa's economic resilience and institutions and governance, which is a priority in both the national development plan and the Samoa Country Plan.

Budget support has been used in addressing sector priorities, and while local implementation capacity constraints will need to be addressed, this modality can be utilised for sector–specific development needs.

Samoa remains vulnerable to the impacts of economic shocks and natural and other disasters and the budget support modality has been proven to be effective in providing rapid and flexible responses to these needs. At the same time however, the donor and development partner landscape in the region is changing, including increased interest from some donors and the withdrawal of a traditional donor, and this may impact the traditional donor base for JPAM and place heightened expectations on current JPAM donors.

7.3 Support for CHOGM

While the support for CHOGM activity focused on very specific time–bound outputs that responded to an immediate and practical need, it was highly relevant to the Samoa Programme and a clear expression of New Zealand's partnership relationship with Samoa and brought benefits that were broader than the activity's outputs.

Key learnings

Leveraging institutional and people–to–people linkages

Linkages and relationships between Samoan and NZ Inc agencies were a key feature of the activity – in several instances existing linkages were strengthened through the activity, and often the support provided was a continuation of support provided over the long–term and contextualised for CHOGM and will continue post–CHOGM. However, linkages were not just a product of the engagement, they were **key enablers** in ensuring the support was appropriate to needs and well targeted.

Strengthening institutional and people–to–people linkages and relationships beyond New Zealand and Samoan counterpart agencies was also an important element of the activity. Some Samoan stakeholders valued the role that NZ Inc support played in building and strengthening Samoan cross–agency linkages and relationships, highlighting the role that NZ Inc played in broader system–wide collaboration and coordination.

The approach adopted by NZ Inc personnel was focused on working with Samoan counterparts, rostered in–line. This was appreciated and acknowledged as the key to effective capacity building and highlights the value of a people–to–people approach.

Contextual and cultural competence

Samoan counterpart agencies appreciated the inclusion of NZ Inc personnel with Samoan backgrounds, which, in a situation requiring support teams to deploy quickly, would have brought a deeper understanding of the local, operational and cultural contexts to enable them to 'hit the ground running' in responding to counterpart agencies' needs.

Harnessing the value of NZ Inc technical expertise

The scale of the logistical requirements for CHOGM 2024 necessitated support across a wide range of technical areas, and NZ Inc was well–placed to provide support to critical areas that was underpinned by high levels of experience and expertise and advanced equipment that was instrumental in supporting Samoan agencies to 'step up' to the operational challenge of CHOGM. Importantly, this support was provided in the context of the organisational development of Samoan agency capability that had relevance beyond the immediate CHOGM requirements (in some cases, CHOGM support was a continuation of support commenced years prior to CHOGM).

Partnership

The success of the activity reflected the New Zealand / Samoa partnership. It was strongly aligned with New Zealand's commitment to partner with the Pacific and with Samoa, aligned with the 4YP, used a partnership approach in the delivery of the support and strengthened partnerships between Samoan and New Zealand counterpart agencies and between Samoa and New Zealand.

Areas for improvement

Administration and logistics

Mobilising numerous NZ Inc agencies for a single event entailed significant procurement and contracting processes and stretched administrative resources, which was exacerbated by the relatively short lead time for an undertaking of this scale. Future undertakings of this nature will need to factor in the administrative resourcing requirement and consider opportunities to identify a streamlined approach to contracting.

Sustained benefit

In some cases, the activity built on prior engagement with Samoan counterpart agencies around institutional capacity building, and which has continued post–CHOGM. It would be beneficial for one–off engagements such as this to have clearer links to prior and follow–up engagements as part of a long–term relationship and informed by a strategic approach to institutional strengthening and capacity building.

> ***Recommendation 9***
> *Document and draw together past and planned NZ Inc security–related agency engagement with Samoa counterparts as part of long–term agency and sector planning for institutional strengthening and capacity building to inform the Samoa Country Plan*

Positioning for the future

Security has been included as a priority in the new national development plan and Samoa Country Plan, and the role and value of NZ Inc's contribution to improving counterpart agency capacity has been demonstrated. New Zealand's security–related agencies are well–positioned to make an effective contribution to strengthening Samoa's security–related capabilities, building on strong institutional links and partnerships.

Harnessing NZ Inc capabilities

The CHOGM support activity is a successful model for mobilising NZ Inc capabilities to meet both event–specific and programmatic counterpart agency development needs. Internal lessons learned reports and other reflective processes could be used to codify better practice approaches to inform future mobilisations.

> ***Recommendation 10***
> *Capture and codify the lessons learned from CHOGM support to develop and document a model for mobilising NZ Inc capabilities to meet event–specific and programmatic counterpart agency needs*

7.4 Cocoa agriculture development

Key learnings

Institutional strengthening

The larger cocoa agriculture development activity demonstrated the value of focusing on building strong institutions as a foundation for future growth and sustainability. SKIA is now positioned as the industry's peak body, unifying growers and other associations behind priorities for the future development of the industry.

An inclusive approach

Agriculture in Samoa is a traditionally male–dominated sector, both in terms of the farm workforce and farmer organisations. Through targeted training and SKIA membership, the cocoa agriculture development activities have used an inclusive approach, focusing on women and youth as well as both smallholders and larger producers. The latter is important as increased export sales depends on the aggregation of smallholder production with the production from larger farms, and SKIA plays a vital role in linking growers for this purpose. The workforce is critical in expanding production, and focusing on women and youth is an appropriate strategy, although feedback from growers indicates that access to training has not translated into workforce participation.

Adaptive management

The activities were able to adapt to the interruption of COVID–19 and this is an approach that can be utilised for other activities to respond to changing needs and delivery context.

Areas for improvement

Institutional sustainability

As a fledgling organisation, SKIA has a significant task ahead in maintaining the momentum of both the industry's development and gains in production and export markets and its own operations in advocating for and supporting the development of cocoa agriculture. Its initial progress was due largely to New Zealand's support and the goodwill of key volunteers, and this will need some support, at least in the short term until, increased grower earnings can fully support SKIA (it is noted that SKIA has not yet been able to access GoS funding).

Ministry partnership

Although MAF's initial engagement was limited, it has increased over time. The underutilisation of the MAF nursery, and different approaches such as nursery practices and distribution of plans indicate the need for close engagement of MAF in future cocoa agriculture development activities.

An integrated approach

Development of cocoa agriculture would benefit from an integrated approach rather than through separate activities, guided by an overarching strategic framework for the industry's development.

Positioning for the future

The agriculture sector continues to be a priority for Samoa and is a stated priority in the national development plan. The Samoa Country Plan 2025–2028 does not explicitly reference the sector, although it is related to the economic resilience goals and outcomes.

Noting the observations about the need for integration and consistency in methodologies and practices, the cocoa agriculture development achievements thus far have laid the groundwork for future development of the industry. Although there is some way to go in terms of achieving increasing production and export sales, results thus far have unified the industry, established its peak body, introduced improved plant stock and practices and opened export pathways.

Working in closer collaboration with MAF, future development should be guided by an overarching development strategy for the industry and an integrated and sequenced approach to support activities including further strengthening and support for SKIA.

7.5 Private sector development

Key learnings

An integrated approach

The private sector development activities were implemented in the context of multiple activities and differing approaches without an overarching strategic framework. While each achieved their planned outputs, there was limited integration and 'joining up' of activities. Better integration will avoid duplication, improve synergies and maximise the impact of interventions.

Partnership

A key feature of PSDP was close and early engagement of stakeholders, which helped to secure broad support, encouraged data sharing, and fostered a collaborative and inclusive project environment.

Flexibility and adaptation

Activities were implemented in a period of national health emergencies that impacted delivery and required adaptation of timeframes, delivery mechanisms and work plans. In the case of PSDP, this included clarifying the activity's scope and roles and strengthening communication to ensure the activity remained relevant and responsive to the evolving needs and context.

Technical assistance

Activities made good use of local and international specialist and technical expertise in developing interventions and policy, in providing direct support to businesses and in building the capacity of organisations supporting the private sector.

Areas for improvement

Cross–cutting themes

Climate change resilience is particularly relevant to private sector development, given the vulnerability of the agriculture and tourism sectors to climate change impacts. While this is embedded in the MDF approach, consideration of climate change resilience in the direct support and advice provided to businesses may be beneficial. However, it is acknowledged that climate resilience is addressed in other investment areas. In relation to GEDSI, while programs capture disaggregated data to measure factors such as access and participation, explicit strategies are also needed to address barriers and challenges faced by marginalised populations.

Monitoring and reporting

Measuring outcomes is challenging, and although PSDP has a comprehensive MERL framework, some elements are incomplete or not measured. This may benefit from some streamlining and consolidation, given these challenges and the capacity and resources available to collect data. In addition, given the multiple activities in the private sector development space, consideration could be given to the compatibility and integration of relevant data, from various programmes. This is something that could be considered in the development of a future integrated private sector development programme.

Positioning for the future

While the goals and outcomes of the Samoa Country Plan 2025–2028 do not reference the private sector, it is explicit in the national development plan and it is related to the Samoa Country Plan's economic resilience goals and outcomes. Although the investments thus far are yet to yield significant results in terms of business growth, partly due to COVID–19 impacts and lead time required to achieve change, the private sector activities are well–positioned to support the Samoa Country Plan. This is because they have focused on strengthening the enabling environment, identifying market development opportunities and building institutional capacity. In addition, and importantly, the PSDP has been informed by the national sector plans and strengthened the partnership with MCIL.

However, noting the previous observation on the need for integration, future Samoa Programme investments will benefit from an integrated, strategic approach to support private sector development in Samoa.

Appendix A – Samoa Four Year Plan logic diagram

Figure 16 – Samoa Four Year Plan logic diagram

STRATEGIC GOALS

STRATEGIC GOAL 1: RESILIENCE	STRATEGIC GOAL 2: WELL-BEING	STRATEGIC GOAL 3: SECURITY
Strengthen Samoa's economic and institutional resilience.	Support an inclusive Samoa in which all Samoans reach their full potential through enhanced well-being (hauora)[1].	Build a secure Samoa, founded on strong partnership and collective action for long-term regional security.

MEDIUM TERM OUTCOMES

MO1.1:	MO1.2:	MO2.1:	MO2.2:	MO 3.1:	MO 3.2:	MO 3.3:
Strong institutions and effective governance enable the Government of Samoa to build back stronger and deliver quality services.	Samoa's private sector contributes to sustainable recovery and growth.	Samoans have increased education and employment pathways.	Samoa has a more accessible, effective and efficient health system to respond to health crises and ongoing health challenges.	Samoa is able to implement its climate change and environmental strategies across sectors effectively.	Samoa and Aotearoa New Zealand collaborate effectively on a shared regional and global agenda for mutual benefit.	Samoa's security is strengthened and its sovereign interests are protected.

SHORT TERM OUTCOMES: key changes expected to result from MFAT activities and engagement in 3–5 years

STO1:	STO2:	STO3:	STO4:	STO5:	STO6:	STO7:
Samoa is on track to fully realise the benefits of improved ICT connectivity and capability to support institutional resilience.	Samoan businesses are well-positioned to recover and grow (in the private, tourism, and agriculture sectors).	New Zealand's budget support helps Samoa implement its key policy reforms and COVID-19 recovery measures, including social protection.	Improved educational and development opportunities, including through inclusive job creation, labour mobility, scholarships and skills development, with a particular focus on Samoa's youth.	Strengthened capability, preparedness and resilience in Samoa's health sector to respond to health crises (including COVID-19) and ongoing health challenges; and increased access to primary health care across communities.	Strengthened capacity and capability in responding to climate change impacts and environmental sustainability challenges.	Strengthened institutional linkages and policy exchange between New Zealand and Samoan agencies for painga kōtahi (mutual benefit), including on security and the movement of people.

Increasing influence of external/ contextual factors

MFAT has more influence

Appendix B – Triennial IDC funding

Table 16 – Triennial funding for International Development Cooperation

Triennium	International Development Cooperation		Pacific Development Cooperation	
	Funding NZDb	Increase %	Funding NZDb	Increase %
2015–2016 to 2017–2018	1.72		1.01[1,2]	
2018–2019 to 2020–2021	2.22	29.1	1.36	34.7
2021–2022 to 2023–2024	3.20	44.1	1.87	37.5

Source: MFAT Annual Reports and https://www.mfat.govt.nz/en/aid–and–development/our–approach–to–aid/where–our–funding–goes/our–planned–aid–expenditure/

1. Covers funding to all countries and regions, including the Pacific

2. Excludes scholarships (NZD201.0 million)

Appendix C – IDC expenditure 2018–2024 by allocation group

Table 17 – International Development Cooperation expenditure by category

Allocation group	2018–2019		2019–2020		2020–2021		2021–2022		2022–2023		2023–2024	
	NZDm	%	NZDm	%	NZDm	%	NZDm	%	NZDm	%	NZDm	%
Pacific Dev Coop	406.5	57.4	405.5	55.1	489.7	60.9	550.2	66.5	567.4	58.4	752.7	57.9
Global Dev Coop	125.2	17.7	129.0	17.5	115.5	14.4	74.7	9.0	152.2	15.7	203.5	15.7
Multilateral	125.0	17.7	147.1	20.0	131.8	16.4	142.2	17.2	172.9	17.8	152.8	11.8
Humanit'n Assist	50.0	7.1	50.0	6.8	59.8	7.4	54.8	6.6	75.0	7.7	83.4	6.4
Other Funds	1.2	0.2	4.7	0.6	7.6	1.0	5.0	0.6	4.0	0.4	9.4	0.7
Total funding	**707.9**	**100.0**	**736.3**	**100.0**	**804.4**	**100.0**	**826.9**	**100.0**	**971.5**	**100.0**	**1,201.8**	**100.0**

Source: MFAT Annual Reports

Appendix D – Pacific Development Cooperation expenditure by country

Table 18 – Pacific Development Cooperation expenditure by country

	2018–2019		2019–2020		2020–2021		2021–2022		2022–2023		2023–2024	
Country / Region	NZDm	%	NZDm	%	NZDm	%	NZDm	%	NZDm	%	NZDm	%
Cook Islands	34.6	8.2	34.4	7.7	52.7	10.8	109.8	20.0	57.0	10.0	23.5	3.1
Fiji	17.5	4.1	36.4	8.1	59.8	12.2	72.0	13.1	42.7	7.5	66.9	8.9
Kiribati	19.6	4.6	21.2	4.7	37.4	7.6	19.6	3.6	28.7	5.1	52.3	6.9
Nauru	6.5	1.5	4.8	1.1	5.1	1.0	3.4	0.6	4.3	0.8	6.2	0.8
Niue	34.5	8.2	24.6	5.5	24.8	5.1	49.4	9.0	36.4	6.4	38.7	5.1
Other / North Pacific	3.7	0.9	11.0	2.5	4.0	0.8	6.9	1.3	7.4	1.3	14.9	2.0
Papua New Guinea	40.5	9.6	37.5	8.4	31.5	6.4	25.9	4.7	31.4	5.5	62.6	8.3
Samoa	27.9	6.6	34.7	7.8	26.1	5.3	46.3	8.4	55.5	9.8	66.6	8.8
Solomon Islands	37.6	8.9	32.2	7.2	45.4	9.3	46.2	8.4	42.8	7.5	61.5	8.2
Tokelau	26.2	6.2	44.0	9.8	20.7	4.2	15.2	2.8	20.0	3.5	23.9	3.2
Tonga	15.8	3.7	24.1	5.4	27.0	5.5	23.8	4.3	61.2	10.8	60.1	8.0
Tuvalu	10.3	2.4	7.5	1.7	13.1	2.7	11.2	2.0	15.3	2.7	41.9	5.6
Vanuatu	29.4	7.0	30.6	6.8	39.2	8.0	30.6	5.6	27.5	4.8	55.1	7.3
Pacific Regional	118.2	28.0	103.9	23.2	102.8	21.0	90.0	16.4	137.0	24.2	178.5	23.7
Total funding	**422.9**		**446.9**		**489.7**		**550.2**		**567.4**		**757.7**	

Source: MFAT Annual Reports

Appendix E – Programme activities by theme

Table 19 – Programme activities by theme

Theme	Activities		Total Planned Value	
	n	%	NZDm	%
Climate & Environment	13	6.0	16.85	6.5
Economics	24	11.2	102.68	39.8
Education	57	26.5	60.05	23.3
Governance & Institutions	16	7.4	13.85	5.4
Health	50	23.3	27.65	10.7
Industry & Innovation	18	8.4	25.10	9.7
Infrastructure & Energy	10	4.7	5.55	2.2
No Theme	13	6.0	3.65	1.3
Oceans & Fisheries	1	0.5	0.01	0.0
Peace & Security	2	0.9	0.08	0.0
Social Inclusion	11	5.1	2.64	1.0
Grand total	**215**	**100.0**	**257,84**	**100.0**

Appendix F – Spread of activities by value

Table 20 – Spread of activities by value

Value range NZD	Projects n	Percentage %
0 to 10,000	48	22.2
10,001–100,00	58	27.0
100,001–500,000	47	21.9
500,001 to 1,000,000	27	12.6
1,000,001 to 5,000,000	23	10.7
5,000,001 to 10,000,000	3	1.4
10,000,001 and over	9	4.2
Total	215	100.1

Appendix G – Key stakeholder list

Table 21 – Key stakeholder list

Stakeholder category	Organisation / unit	Name and position
NZ Govt	New Zealand High Commission to Samoa	Si'alei van Toor, High Commissioner
		Lavea'i Ioane, Deputy High Commissioner and First Secretary Development
		Situfu Salesa, Senior Development Programme Coordinator
		Measina Meredith, Senior Development Programme Coordinator
		Kala Ah Mu, Development Programme Coordinator
		Roni Fuimaono, Development Programme Coordinator
	Pacific Polynesia and French Pacific Division	Jane Coombs, Divisional Manager
		Zoe Coulson–Sinclair, Unit Manager, Samoa, Tonga, Tuvalu
		Sara Demas, Samoa Programme Manager
	Development Economy and Prosperity Division	Nick Rusell, Economic Adviser
		Guy Redding, Lead Adviser, Industry and Innovation
		Paul Davis, Senior Adviser, Tourism
		Jaistone Finau, Policy Officer
GoS	Samoa High Commissioner to New Zealand	Afioga Afamasaga Faamatalaupu Toleafoa, High Commissioner
		Juliana Faataualofa Lafaialii, Deputy Head of Mission, Counsellor
	Ministry of Foreign Affairs and Trade	Peseta Noumea Simi, CEO
	Ministry of Finance	Saoleititi Maeva Betham–Vaai, CEO
	Ministry of Prime Minister and Cabinet	Agafili Shem Leo, CEO
	Public Service Commission	Kolone Tikeri, PSC Secretary
	Ministry of Health	Sina Faaiuga, Acting Director General
		Fata Paulo Pemita Seuseu, Acting Deputy Director General
		Dr Elizabeth Tauati–Williams, ACEO Oral and Dental Health
	Ministry of Education and Culture	Aeau Chris Hazelman, CEO
	Ministry of Customs and Revenue	Fonoti Talaitupu Li'a–Taefu, CEO
	Ministry of Agriculture and Fisheries	Seuseu Dr Joseph Tauati, CEO

Stakeholder category	Organisation / unit	Name and position
	Ministry of Works, Transport and Infrastructure	Fui Tupai Mau Simanu, CEO
	Ministry of Commerce, Industry and Labour	Pulotu Lyndon Chu Ling, CEO
	Central Bank of Samoa	Governor Maiava Atalina Ainuu–Enari
	Samoa Fire and Emergency Services Commissioner	Tanuvasa Petone Mauga, Commissioner
	Ministry of Lands and Survey	Asi Peleiupu, Acting CEO and ACEO of Lands and Survey
	Samoa Tourism Authority	Tracey Wong Ling Warren, Acting CEO
Private sector	Samoa Chamber of Commerce and Industry	Lita Lui, CEO
	Samoa Business Hub	Unasa Atuaisaute Misipati, CEO
Cocoa Industry	AgriChain Centre Ltd	Dr Hans Maurer, Director Strategy and Research
	SPS Biota	Pavel Muron, Offshore Programme Manager
	Massey University	Professor Nick Roskruge
	Samoa Koko Industry Association	Alo Kolone Vaai, President
	Savai'i Koko (producer / exporter)	Tupai Saleimoa Va'ai
	Cocoa farmer, SKIA member	Gasu Vilo, Satuiatua Village
	Cocoa farmer, SKIA member	Alofipo Petelo, Saleaula Village