AN ASSESSMENT OF ZIMBABWE'S NATIONAL DEVELOPMENT STRATEGY 1

2021-2025

Matron Muchena, Rebekah Cross and Eddah Jowah

July 2026

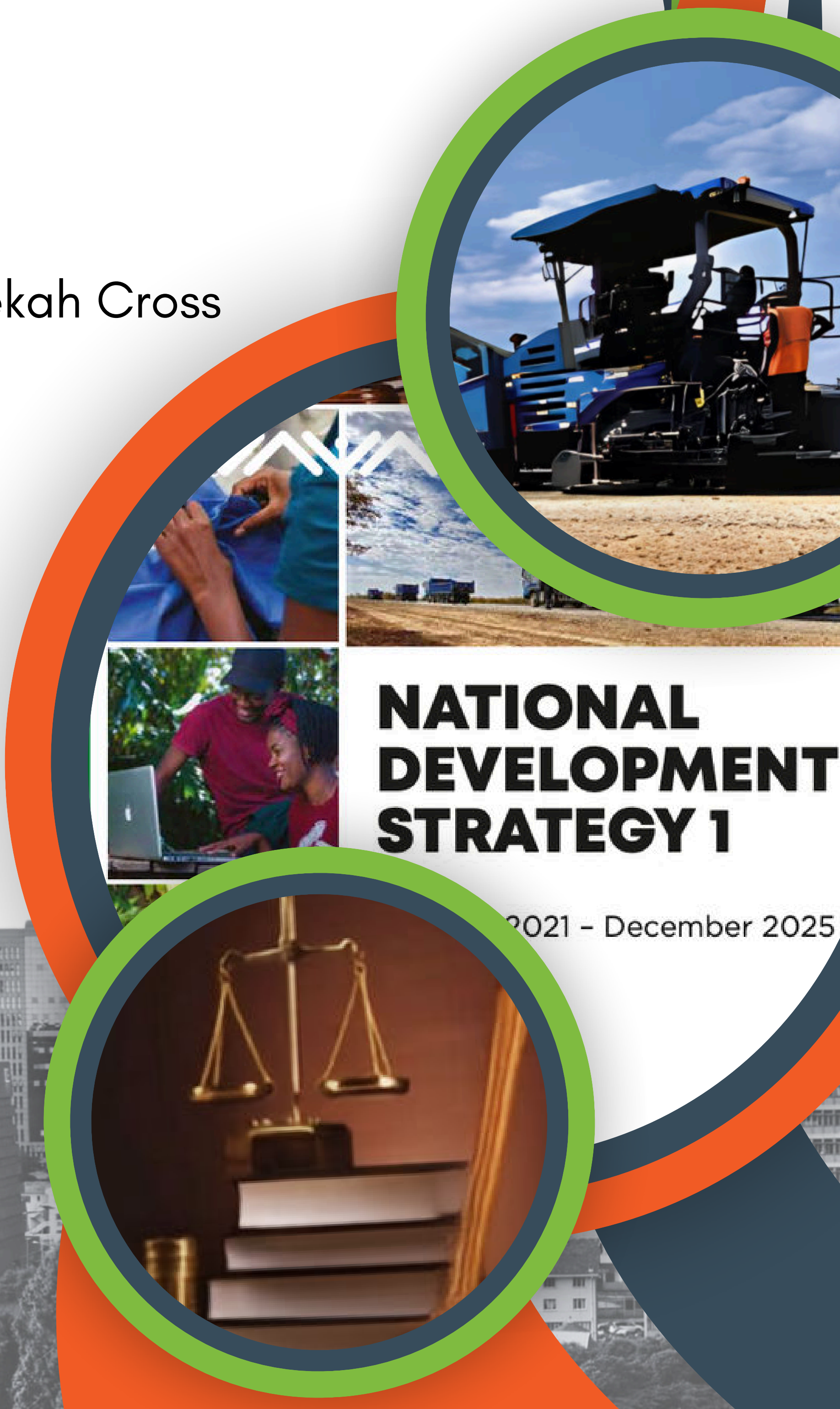

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

LIST OF ACRONYMS

ACW	African Citizens Watch
AFC	Agriculture Finance Corporation
AU	African Union
BRICS	Brazil, Russia, India, China, South Africa
CPE	Citizens Perceptions and Expectations
CSO	Civil Society Organisation
ERRP2	Emergency Road Rehabilitation Programme 2
FANRPAN	Food, Agriculture & Natural Resources Policy Analysis Network
FAO	Food and Agriculture Organisation
FDI	Foreign Direct Investment
FEWS Net	Famine Early Warning Systems Network
GDP	Gross Domestic Product
GoZ	Government of Zimbabwe
ICSZ	Institute of Cyber Security Zimbabwe
ICT	Information and Communication Technology
IMF	International Monetary Fund
MSMEs	Micro, Small and Medium Enterprises
NHS	National Health Strategy
NGO	Non-Governmental Organisation
NDS1	National Development Strategy 1
PPP	Public-Private Partnership
RBZ	Reserve Bank of Zimbabwe
RTGS	Real-Time Gross Settlement
SADC	Southern African Development Community
SEZ	Special Economic Zone
SME	Small and Medium Enterprises
STEAM	Science, Technology, Engineering, Arts and Mathematics
TSP	Transitional Stabilisation Programme
UN DESA	United Nations Department of Economic and Social Affairs
VAT	Value Added Tax
WHO	World Health Organisation
ZCTU	Zimbabwe Congress of Trade Unions
ZIDA	Zimbabwe Investment and Development Agency
ZiG	Zimbabwe Gold (currency)
ZIMCODD	Zimbabwe Coalition on Debt and Development
ZIMSTAT	Zimbabwe National Statistics Agency
ZINARA	Zimbabwe National Road Administration
ZMPO	Zimbabwe Macro Poverty Outlook
ZNCC	Zimbabwe National Chamber of Commerce
ZWL	Zimbabwean Dollar

INTRODUCTION

The Government of Zimbabwe (GoZ) implemented the National Development Strategy 1 (*NDS1*) from 2021 to 2025. It was the government's medium-term plan to advance (Vision 2030), a national development framework by the government which aims to transform the country into an upper middle-income economy by 2030. According to the Government of Zimbabwe (GoZ, *2020*), the central objective of NDS1 was to build an upper-middle-income economy by fostering sustainable growth, stabilising prices and the currency, managing public finances responsibly, expanding infrastructure such as roads and energy, creating jobs, and strengthening social protection.

The NDS1 succeeded the Transitional Stabilisation Programme (*TSP*), which was implemented from 2018 to 2020 as a two-year recovery plan focused on macroeconomic stabilisation and structural reforms. This positioning made NDS1 both a continuation of the government's stabilisation agenda and a framework for translating Vision 2030 into medium-term development priorities.

The NDS1 prioritised revitalising key sectors, including agriculture, mining, and manufacturing, while harnessing national strengths and reducing poverty.

As SIVIO Institute, we have been tracking the GoZ's commitment to NDS1 through our own accountability *tracker*. Before tracking the NDS1, we carried out a study on how the government had fared in implementing the TSP. Our tracking focuses on the extent to which the government converts the objectives of the NDS1 into action.

The conclusion of the NDS1 on 31 December 2025 provides us with an opportunity to assess the extent of the government's achievements or failures in aligning with the NDS1. There were 17 priorities in the NDS1 (See Figure 1).

The purpose of the assessment is broader than a technical evaluation. It serves as one of many avenues to discuss how the government is responding to needs on the ground, demonstrating its commitment to resolving public problems and its capacity to focus on a five-year development programme. Furthermore, this assessment report situates NDS1 within Zimbabwe's broader development trajectory and evaluates the extent to which government actions have aligned with strategic priorities and citizen expectations.

Priority Areas Identified in the National Development Strategy 1

1	2	3	4	5
Macroeconomic Management and External Sector	**Infrastructure, Housing, and Land Delivery**	**Governance, Devolution and International Engagement**	**Social Services and Human Capital**	**Climate Resilience, Food Systems, and Natural Resource Management**
• Economic Growth and Stability • Fiscal and External Sector • Money and Financial Sector • Digital Economy	• Infrastructure and Utilities • Housing and Land Delivery	• Image Building • International Engagement • Devolution • Governance	• Social Protection • Health and Wellbeing • Youth, Sports and Culture	• Food and Nutrition Security • Environmental Protection • Natural Resource Management • Climate Resilience

Figure 1: Priority Areas as Outlined in NDS1

METHODOLOGY

This report employs a mixed-methods evaluative design, integrating secondary data analysis with qualitative insights to assess the performance of the NDS1. It is based on the triangulation of GoZ progress reports, budget statements, and statistical agency publications with independent civil society assessments and media coverage to ensure a balanced perspective. The report uses data from our *Zim Citizens Watch* tracker, an independent platform that tracks the performance and effectiveness of the GoZ. Traditionally, our tracking has involved analysing the extent to which governments convert electoral promises into policy actions[1]. However, the ruling party did not produce a manifesto for the 2023 elections and campaigned on its 'record of past performance'. In the absence of a manifesto, we assessed the government's performance against commitments made under NDS1. Between 2023 and 2025, when tracking on the NDS1 commitments began, we independently monitored the majority of government actions, offering a barometer-based analysis of progress across key sectors, which were informed by citizens' priorities that we gathered from our 2023 Citizens Perceptions and Expectations (*CPE*) Survey.

The NDS1 outlined 17 national priorities. For analytical clarity, these have been consolidated into five (5) broad clusters:

1. Macroeconomic Management and the External Sector
2. Infrastructure, Housing, and Land Delivery
3. Governance, Devolution, and International Engagement
4. Social Services and Human Capital
5. Climate Resilience, Food Systems and Natural Resource Management

The five (5) clusters reflect the government's stated commitments and provide a coherent framework for analysis. The discussion in this report is structured around the clusters above.

[1] *We are currently tracking the extent to which the governments of Botswana, Malawi, South Africa and Zambia are converting electoral promises into policy actions African Citizens Watch*

Key indicators, including economic growth, poverty reduction, and health service delivery, were benchmarked against NDS1 targets. The analysis relies primarily on publicly available data, which may limit depth and granularity, particularly in the absence of disaggregated provincial statistics. Our *Zim Citizens Watch* platform provided independent monitoring of government actions. The findings present a mixed picture.

BACKGROUND AND CONTEXT

As already stated, before the adoption of NDS1 in 2021, the government had implemented the Transitional Stabilisation Programme (*TSP*) from 2018 to 2020. The TSP achieved the following: a reduction in annual inflation from 175% in mid-2019 to around 60% by late 2020, following fiscal consolidation and tighter monetary *policy*. The fiscal deficit narrowed from 7% of Gross Domestic Product (GDP) in 2018 to below 2% by 2020, largely due to expenditure restraint and improved revenue collection. The TSP also initiated debt restructuring negotiations with international creditors, laying the groundwork for re-engagement with multilateral institutions. In addition, the programme facilitated currency reforms, including the reintroduction of the local Zimbabwe dollar (ZWL) in 2019, which aimed to restore monetary sovereignty.

Several assessments[1] observed that while the TSP provided a roadmap for reform, many of its goals remained only partially achieved. However, despite these stabilisation efforts, the World Bank GDP growth *series* for Zimbabwe shows that GDP contracted by 6.3% in 2019 and by a further 7.8% in 2020, due to drought, Cyclone Idai, and the impact of COVID-19. Official data from the Zimbabwe National Statistics Agency (ZIMSTAT) in *2020* confirmed that poverty levels worsened, with the proportion of the population living below the national poverty line rising above 70%. Structural reforms in state-owned enterprises and public finance management were initiated but not fully implemented, leaving vulnerabilities unresolved. Overall, while the TSP succeeded in narrowing fiscal imbalances and restoring a measure of macroeconomic stability, it fell short in delivering sustained growth and poverty reduction.

[1] *see for instance, LEDRIZ (2020) & ZIMCODD (2020)*

Table 1: Overview of Performance of TSP

Pillar/ Area	Target	Progress Made	Outstanding Issues
Macroeconomic Stabilisation	Real GDP growth: 6.3% (2018), 9.0% (2019), 9.7% (2020); Budget deficit ≤5% GDP; Currency stability	Narrowed budget deficit to -5.3% (2018) and surplus 0.6% (2019); Positive current account balance (0.41% GDP, 2018)	GDP contracted -6.3% (2019), -7.8% (2020); Persistent inflation and exchange rate volatility
Fiscal Discipline	Reduce fiscal deficit; Improve revenue collection; Cut wasteful expenditure	Achieved fiscal consolidation; Reduced domestic arrears; Improved revenue performance (short-term)	Structural vulnerabilities remained; Limited debt resolution; Public service delivery fragilities persisted
Private Sector & Growth	Attract Foreign Direct Investment (FDI); Boost exports; Job creation and poverty reduction	Some policy reforms initiated (e.g., ease of doing business); Modest private sector engagement	Low FDI inflows; Exports stagnant; Poverty rose to ~70% by 2020; High unemployment/ underemployment
Institutional Reforms	Reform State Owned Enterprises (SOEs); Strengthen public finance management; Fight corruption	Reforms started in some SOEs and procurement; Anti-corruption measures announced	Implementation slow/partial; Poor institutional capacity; Corruption persisted
Social Outcomes	Poverty eradication; Improved services (health, education, water)	Limited targeted interventions (e.g., social cash transfers)	Poverty headcount worsened; Food insecurity rose; Service delivery gaps (e.g., medicine stockouts)

The TSP's mixed outcomes left critical gaps in achieving the government's goal of becoming an upper-middle-income country by 2030. Furthermore, there is a growing perception among citizens that the government is not prioritising urgent issues. Our annual Citizens' Perceptions and Expectations Surveys (CPE), conducted between *2018* and *2020*, identified employment creation as the top citizen concern, followed by improved social services delivery (especially health) and fighting corruption. These demands reflected lived realities: broad unemployment remained high, poverty headcount rose above 70% by 2020 (World Bank, *2020*), and public services faced persistent shortages of medicines, staffing deficits, and infrastructure decay.

It was against this backdrop of unfinished reforms and pressing citizen priorities that NDS1 was launched in November 2020 as Zimbabwe's next step towards achieving upper middle-income status by 2030.

The launch of NDS1 was framed by the government as Zimbabwe's decisive step towards long-term transformation (GoZ, *2020*). It was presented not only as a continuation of earlier stabilisation efforts but also as a comprehensive plan to rebuild trust, restore growth, and align national priorities with Vision *2030*. The strategy's emphasis on macroeconomic stability, infrastructure renewal, and social protection reflected both the unfinished business of the TSP and the urgent demands of citizens for tangible improvements in daily life. The NDS1 became a litmus test of the government's ability to convert promises into delivery. Its conclusion in 2025 provides an opportunity to measure progress made.

Ultimately, the analysis of the GoZ's performance in converting the objectives of NDS1 into tangible action cannot be successfully conducted without highlighting the broader macroeconomic environment. The period was marked by volatility and uneven progress. External shocks such as the COVID-19 pandemic disrupted supply *chains* and reduced productivity, while inflationary pressures eroded household incomes (World Bank, 2022). The Reserve Bank of Zimbabwe's 2024 Monetary Policy Statement acknowledged ongoing challenges of price and exchange-rate instability, noting efforts to restore confidence in the ZWL (RBZ, 2024). Mutengezanwa et al. (*2012*) highlight that this instability has historically undermined trust in the local currency, with businesses and consumers expressing concerns about uncertainty in the financial environment following its reintroduction. Together, these factors illustrate how currency instability and the reintroduction of the ZWL created significant uncertainty for both businesses and consumers.

Mining and agriculture provided some growth momentum during the TSP period. The *Economic and Fiscal Report for the Year 2022* (Ministry of Finance and Economic Development, *2023a*) notes that mining contributed approximately 12-15% to GDP while agriculture contributed 15-19%, together accounting for around 30% of total output. The Chamber of Mines, 2022 Annual *Report* indicates that mining growth was driven by increased gold and diamond production, while agriculture benefited from targeted interventions such as mechanisation schemes despite drought challenges (Chamber of Mines, 2023).

However, structural weaknesses, including limited private-sector investment and cumbersome regulations, constrained the broader recovery. The World Bank's 2025 Zimbabwe Economic *Update* highlighted that the country's regulatory environment remains cumbersome, characterised by overlapping agencies, lengthy licensing procedures, and inconsistent enforcement, which raise costs for businesses (World Bank, 2025). Foreign Direct Investment (FDI) inflows remained low at under 1% of GDP, hampered by regulatory delays such as lengthy registration (over 600 days) for seeds and lack of access to public genetic materials for private breeders, which discouraged investment beyond extractive sectors (FANRPAN, *2022*).

The World Bank's Zimbabwe Macro Poverty Outlook (*2026a*) highlights that growth slowed to 1.7% in 2024 due to the El Niño-induced drought. Recent statistics show that GDP growth rebounded to 8.1% in 2025 (World Bank, *2026b*).

Debt sustainability remained a central challenge. The 2025 Public Debt *Report* highlights that by September 2025, Zimbabwe's total public and publicly guaranteed debt had reached approximately US$23.4 billion, representing an 8.8% increase from US$21.5 billion as at the end of December 2024 (Ministry of Finance and Economic Development, 2025). These figures have grown since NDS1 was launched in December 2020. The 2021 Annual Debt Management *Report* for Zimbabwe stated that the debt was US$10.7 billion, 72% of GDP (ZIMCODD, 2021). External and domestic debt accounted for 58% of total debt. Most bilateral obligations, including those to the Paris Club, were in arrears, limiting access to concessional financing. Zimbabwe's large debt burden left the government with very little room in its budget, making it harder to raise resources to fund the rehabilitation of roads, energy infrastructure, schools, and healthcare. At the same time, domestic arrears continued to accumulate, reflecting persistent weaknesses in expenditure management.

In *2025*, ZIMSTAT rebased GDP figures upward to US$44.4 billion following the release of the 2023 Economic Census (ZIMSTAT, 2025b). For the first time, the per capita income crossed the US$3,000 threshold. Although rebasing improved the debt-to-GDP ratio statistically, it did not address the larger fiscal risks or ease the burden of high living costs for citizens. The mining sector, especially gold and platinum, remained a key driver of growth, with agriculture and tourism making significant contributions. However, these gains were unevenly shared and remained highly vulnerable to climate shocks.

Socially, the NDS1 period was defined by both resilience and strain. Health systems struggled under the weight of the pandemic, characterised by overwhelmed hospitals facing shortages of beds, oxygen, and personal protective equipment, and staff burnout. According to an article by Midzi et al. (*2025*), COVID-19 disrupted maternal health services, child immunisation, tuberculosis treatment, and routine outpatient care. Hospitals had to postpone elective procedures, reallocate limited staff, and expand intensive care units to cope with surges in patients. Public health systems were equally strained: surveillance and testing capacities were stretched, vaccination campaigns had to be rapidly scaled up, and routine services such as maternal and child health care were disrupted. Midzi et al. (2025) also noted that Zimbabwe's health programs had significant declines in antenatal visits, institutional deliveries, immunisation coverage, and tuberculosis case detection during the pandemic, highlighting how both hospital and public health systems were overwhelmed (Midzi et al., 2025).

Education faced disruptions due to lockdowns and resource shortages. Poverty levels remained high; approximately *60%* of the population lived on less than $3.65 a day as of April 2025 (Delbarre, 2025). Many households rely on informal-sector activities and remittances. Infrastructure projects, such as road rehabilitation and energy expansion, offered visible signs of progress, yet access to reliable electricity, affordable healthcare, and adequate housing remained limited.

Photo by Noah Denhe

EXAMINING THE EXTENT OF PROGRESS MADE (2021-2025)

Over the past five (5) years, the government's performance in implementing NDS1 was shaped by a complex interplay of internal and external factors. Internally, the government tried to bring stability by tightening spending, controlling the money supply, and mobilising domestic resources to stabilise inflation and the exchange rate. This was meant to tame inflation and steady the exchange rate. Inflation had spiralled to extreme levels in 2020, reaching over 785% in May *2020* (Trading Economics, 2026). By 2025, stricter monetary policies had helped bring inflation down to around 15% in December 2025, signalling relative stability.

However, debt arrears and limited access to concessional financing constrained fiscal space for NDS1 implementation. Global shocks compounded these challenges: COVID-19's lasting impacts reduced long-term GDP potential by an estimated 4-8% (Kose & Ohnsorge, *2023*), while fuel price volatility and commodity price cycles increased public spending requirements by up to 2% of GDP annually. The 2023-2024 El Niño-induced drought was particularly disruptive, slowing GDP growth to 1.7% in 2024 by reducing agricultural output and food security, before recovery prospects improved to 8.1% in 2025 on the back of better climate conditions, strong mining export prices, and remittance inflows.

Macroeconomic Management and External Sector

The GoZ made 22 commitments towards economic growth and stability. These commitments covered a range of areas, including fiscal and external sectors (budget discipline, trade balances, external debt), monetary policy (currency stability, inflation control), the financial sector, and the digital economy. Key commitments under this cluster included:

(i) restoring the ZWL as the dominant legal tender by 2025,

(ii) creating 760,000 formal jobs,

(iii) raising per capita income to US$3,200, and

(iv) sustaining real GDP growth above 5% per annum.

Restoring the ZWL as the dominant legal tender by 2025

In pursuit of restoring the ZWL as the dominant legal tender by 2025, the government *introduced* the gold-backed Zimbabwe Gold (ZiG) currency in April 2024 to replace the depreciating Real-Time Gross Settlement (RTGS) dollar, supported by tight monetary measures, including 35% interest rates and stricter reserve requirements (Al Jazeera, 2024). Reports (see, for instance, Chikohomero & Nyoni, *2024*) indicated that these interventions temporarily reduced inflation from 55.3% in March 2024 to 33.6% in June 2024, offering short-term price relief for basic goods. However, the transition disrupted livelihoods, as informal traders and transport operators refused to accept local currency, compelling commuters to pay premiums in United States Dollars (Moyo, *2024*). The World Economic Forum argues that, despite initial gains, the ZiG currency failed to establish full legal-tender dominance, as the multi-currency regime remains in place until 2030 (Feingold, *2024*). Public mistrust, compounded by the delayed availability of physical notes and a legacy of past currency failures, undermined confidence, particularly among the informal economy workforce, which constitutes over 70% of the population.

Creating 760,000 formal jobs

To meet the NDS1 target of creating 760,000 formal jobs, reports from the Ministry of Women Affairs, Community, Small and Medium Enterprises Development, Ministry of Lands, Agriculture, Fisheries, Water and Rural Development and online news agencies highlighted several government initiatives. These included the launch of the Small and Medium-sized Enterprise (SME) revolving funds, the rollout of Pfumvudza/Intwasa input schemes reaching 1.6 million households, and the Hwange Units 7 and 8 expansion projects (Nyeve, 2025), which generated short-term employment opportunities and wider local economic spillovers benefiting an estimated 50,000 people. These initiatives are reported to have collectively generated approximately 270,000 formal jobs, about 35% of the NDS1 target, mainly in seasonal agriculture and construction. However, the Zimbabwe Congress of Trade Unions observed that persistent youth unemployment forced many to rely on informal trade despite GDP growth (New Zimbabwe, *2026*). Critically, job creation measures leaned towards short-term, low-skill opportunities without a comprehensive industrial policy to absorb graduates, leaving citizens' top priority of employment creation unmet as reflected in public opinion surveys (see, for instance, Sibesha, Ndlovu & Jowah, *2025*).

In this cluster, the GoZ, to some extent, delivered short-term jobs and limited local secondary benefits. It advanced the Buy Zimbabwe and local content agenda as part of NDS1's broader industrialisation and employment objectives, including efforts to increase the presence of locally manufactured goods in retail outlets and support domestic production (Consumer Council of Zimbabwe, *2022*). These measures have helped raise the visibility of local products and generate some short-term business activity. In this sense, the government's approach has contributed to local market promotion, but it has not yet translated into the scale of durable formal employment implied by the 760,000-job commitment.

Raising per capita income to US$3,200

In July 2025, ZIMSTAT released its 2023 Economic Census Preliminary *report*, which highlighted that the country's nominal GDP rose to US$44.4 billion in 2024, placing it at the lower-middle-income threshold (ZIMSTAT, 2025b). While the rebasing suggested progress, the reality for households was less positive. The ZB Financial Holdings (2025) Monthly Economic *Update* for August 2025 revealed that while mining exports, particularly gold, helped deliver the first trade surplus in six (6) years, most citizens saw little improvement in their daily lives. Around 60% of the population continued to live below the international poverty line, as food and basic consumption costs ironically rose sharply.

According to Kanyemba (2025), inflation in the new ZiG currency eroded purchasing power, leaving families struggling to meet essential needs despite headline economic gains. This disconnect highlighted NDS1's challenge; macroeconomic improvements were not translating into tangible welfare benefits for ordinary citizens, underscoring the limited impact of rebasing on citizens' livelihoods.

Sustaining real GDP growth above 5% per annum

As reported by the Zimbabwe Investment and Development Agency (ZIDA, *2025b*), efforts to sustain real GDP growth above 5% per annum were supported by the introduction of the ZiG currency, the licensing of Special Economic Zones (SEZs), and the expansion of Hwange Units 7 and 8, underpinning the revised 8.1% growth achieved in 2025. However, the 2024 El Niño-induced drought reduced growth to 2%, contracting maize production by 64% and hitting rural households hardest, while 2025's growth rate recovery primarily benefited urban formal sectors (mining, manufacturing) more than the informal majority (World Bank, *2025*).

During the NDS1 implementation period, the average annual GDP growth was 5.96% which is above the target of 5% each year. Critically, macroeconomic stability has not adequately translated into household welfare gains for many; unemployment and poverty cycles persist despite headline figures, highlighting NDS1's fundamental disconnect between macro targets and citizen livelihoods (World Bank, *2025*).

Figure 2 outlines the progress made towards achieving the macroeconomic objectives in NDS1.

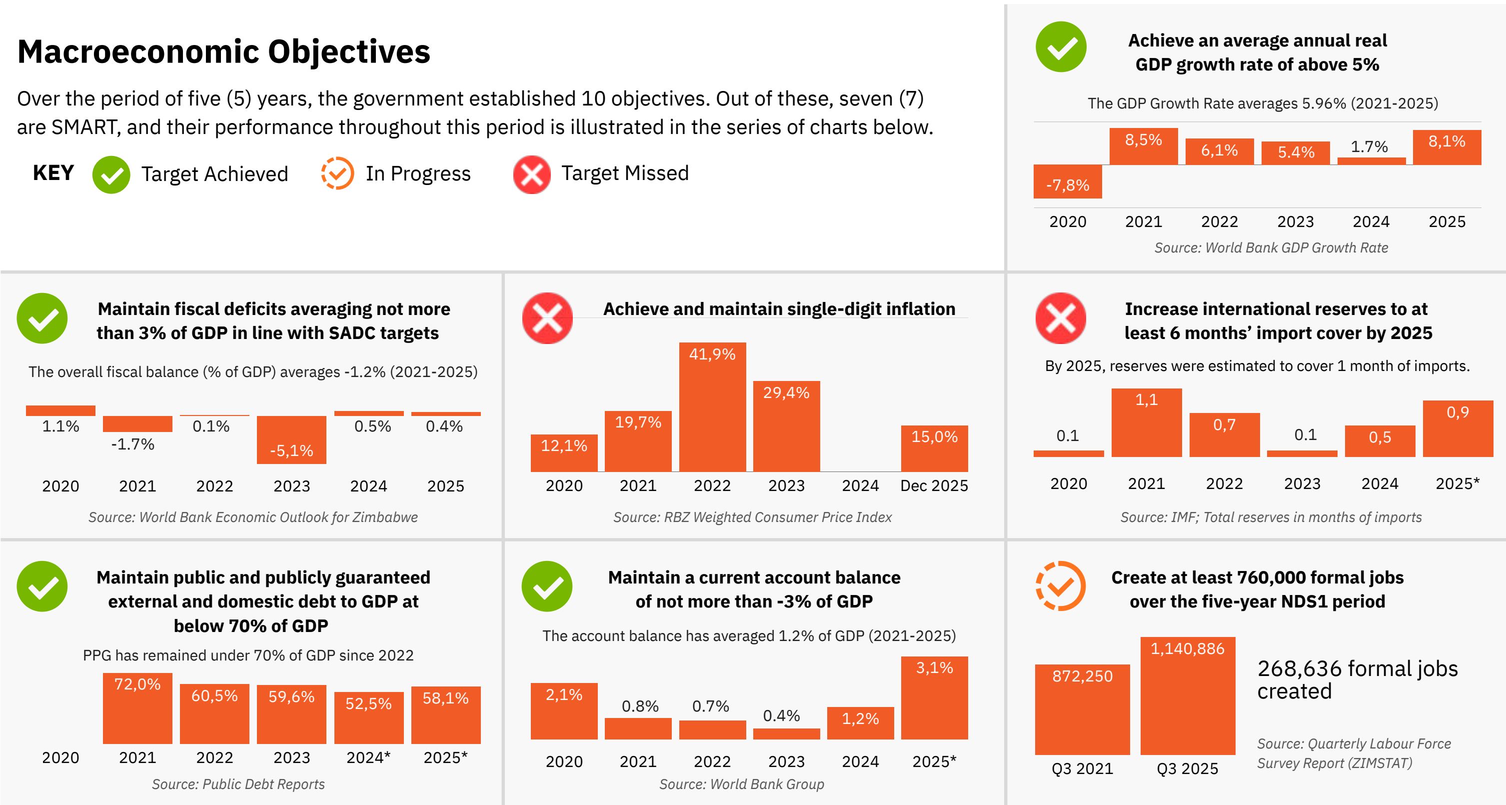

Figure 2: Macroeconomic Objectives in NDS1. Data compiled by SIVIO Institute, 2026.

The government set 10 macroeconomic objectives under NDS1, of which seven (7) were designed to be SMART (Specific, Measurable, Achievable, Relevant, and Time-bound). Out of the seven SMART objectives, four (4) were successfully achieved.

1. **GDP Growth Rate**: Targeted at above 5%, the economy recorded 8.1% growth in 2025.
2. **Fiscal Deficit**: Kept below 3% of GDP, averaging 1.2% over five (5) years.
3. **Public Debt**: Maintained below 70% of GDP, standing at 58% in 2025.
4. **Current Account Balance**: Held within the threshold of 3% of GDP.

However, the following objectives remain unmet:

- **Job Creation**: The government pledged to create 760,000 formal jobs over five years. ZIMSTAT's Second Quarter Labour Force Survey for *2025* shows that only around 270,000 jobs (35%) were created (ZIMSTAT, 2025c).
- **Inflation**: Although inflation eased following the introduction of the ZiG currency in 2024, it has not yet reached the target and stood at 15% by the end of 2025 (ZIMSTAT, *2025d*).
- **International Reserves**: The goal was to build reserves sufficient to cover six months of imports, but by 2025, coverage stood at just 0.9 months.

While macroeconomic stability improved, the failure to deliver 65% of promised formal jobs directly undermined citizens' top priority, employment creation, as identified in our annual CPE Surveys (2018-2025). Limited formal job growth meant persistent youth unemployment and underemployment, forcing most citizens into precarious informal work despite GDP gains. The existing disconnect between macro targets and micro livelihoods may perhaps be a premature concern, but it highlights the limitations of assumptions around the trickle-down effects of broad national development strategies on ordinary households, perpetuating the very socio-economic pressures citizens ranked highest.

Policy and Structural Reforms

The government introduced the gold-backed currency, ZiG, in 2024, with the stated objective of anchoring inflation expectations and reducing dependence on foreign currencies (RBZ, 2024). The introduction represented a significant policy shift by the Reserve Bank of Zimbabwe (RBZ) to tackle the persistent instability that had long plagued the ZWL. By anchoring the new currency to tangible reserves and precious metals, the RBZ aimed to rebuild public confidence and strengthen the foundation of the nation's monetary system. The *Statement* by the Minister of Finance, Economic Development and Investment Promotion in April 2024 highlighted that the early months of ZiG operation had been encouraging (Ministry of Finance and Economic Development, 2024). The exchange rate remained relatively stable, moving only slightly from a rate of US$1 to ZiG13.56 in April 2024 to US$1 to ZiG13.76 in July 2024. Inflation declined from 55.3% in March 2024 to 33.6% by June 2024, while national reserves increased from US$285 million to US$370 million between April and June 2024. However, extending the multi-currency regime to 2030 has effectively delayed full de-dollarisation, signalling ongoing challenges in rebuilding confidence in purely domestic monetary arrangements.

At the same time, industrial policy has been supported through the operationalisation of industrial parks and SEZs, alongside the launch of the Zimbabwe Industrial Reconstruction and Growth Plan in 2024, which seeks to revitalise productive capacity and attract investment (Ministry of Industry and Commerce, 2025). The NDS1 Mid-Term Review notes that during the first half of NDS1, 13 innovation hubs and industrial parks were established at tertiary institutions (GoZ, 2023c). Statistics from ZIDA's 2024 Annual *Report* indicate the review and approval of three (3) SEZ projects spanning mining, energy, manufacturing, and real estate (ZIDA, 2025a).

The GoZ's focus during NDS1 was on employment creation, pursued through interventions in areas such as SMEs, agriculture, and energy. Through the Ministry of Women Affairs, Community, Small and Medium Enterprises Development, the government established SME financing schemes and revolving funds, such as the SME Revolving Fund, to support micro, small and medium enterprises. These facilities aim to expand access to affordable credit for small businesses, enabling them to grow, formalise and create jobs. Empirical evidence consistently highlights the central role of SMEs in national economies. A study by Chikweche et al. (*2023*) highlights that Micro Small and Medium Enterprises (MSMEs) make a considerable contribution to GDP and are deeply embedded in Zimbabwe's economic structure, particularly in retail, vending, agriculture, and services, although many remain financially excluded. This aligns with *analyses* by the International Trade Centre (2023), which emphasise that SMEs account for a substantial share of economic activity, making targeted funding a critical instrument for inclusive growth and job creation.

Through Zimbabwe's Pfumvudza/Intwasa climate-smart agriculture program, inputs were distributed to millions of households. According to the Ministry of Lands, Agriculture, Fisheries, Water and Rural Development, the initiative has supported over 1.6 million vulnerable households with crop inputs (UN DESA, *2023*). Zimbabwe Livelihoods Assessment Committee (*2024*) reported that participation in the Pfumvudza/ Intwasa had risen to more than half of rural households nationwide. The GoZ's own reports indicated over 8 million plots prepared for the 2025 season (Manomano, *2025*). This scale of implementation has generated seasonal employment in input supply, extension services, and agro-processing, while strengthening rural livelihoods.

Moreover, in the energy sector, large-scale projects such as the Hwange Thermal Power Station Expansion (Units 7 and 8) added 600 MW to the grid. The construction phase created a substantial number of temporary jobs, while permanent technical and operational jobs were created to sustain the energy sector. However, recent *critiques* of the 2026 National Budget by Zimbabwe National Chamber of Commerce (ZNCC, 2025) note that government reporting does not clearly account for progress towards these job targets, but rather the continued dominance of informal economic activity and persistent decent-work deficits.

The NDS1 articulated fiscal consolidation and external balance as central pillars of economic stabilisation, targeting a public debt-to-GDP ratio below 70%, fiscal deficits under 3%, and official reserves equivalent to six months of import cover. Progress towards these objectives has been observed in selected areas; for instance, the government *broadened* its revenue base through tax policy adjustments, including an increase in corporate income tax from 24 to 25% (GoZ, *2023a*) and lowering Value Added Tax (VAT) thresholds to capture more businesses. Furthermore, in June 2023, the GoZ introduced Results-Based Budgeting (Ministry of Finance and Economic Development, *2023b*) to ensure that public expenditures are directly linked to the outputs, outcomes, and national priorities outlined in the NDS1. At the same time, initiatives to formalise MSMEs included digital registration platforms, decentralising SME support services to provincial and district centres, and reforms to improve access to finance and infrastructure. These measures reflect a dual strategy of widening the tax net while strengthening the formal business ecosystem.

Similarly, efforts to restore fiscal credibility have been reinforced by the establishment of the Structured Dialogue Platform on *arrears* clearance and debt resolution, and by token payments on long-standing obligations such as compensation to former white commercial farmers (GoZ, 2024b). However, these actions have not yet translated into lasting improvements in public finances, as debt pressures and arrears remain significant. Similarly, the International Monetary Fund (IMF) *reported* intensifying fiscal pressures, continued expenditure arrears into 2025, and deficit financing through Treasury bills and central bank borrowing (IMF, 2025). Zimbabwe's latest Public Debt *Report* likewise indicates that the country remained in debt distress, with accumulated arrears and a high debt burden continuing to constrain fiscal space (Ministry of Finance and Economic Development, 2025). This suggests that the government has made procedural progress in debt engagement but has not yet achieved durable improvements in debt sustainability.

Under the digital economy pillar, the government made commitments, including

i. Information Communication Technology (ICT) Infrastructure Development and Maintenance
ii. Implementation of Ease of Doing Business reforms in ICTs
iii. Implementation of Special Economic Zones for ICTs
iv. Implementation of the ICT Literacy Research and Development Programme

Implementation of these commitments has been uneven and, in some areas, limited in depth and scale. While policy formulation and institutional developments have progressed, tangible outcomes remain inconsistent.

Recent measures such as the *review* of ICT infrastructure standards (Siamilandu, 2025), the launch of the *SMART* Zimbabwe 2030 Master Plan (Ministry of Information Communication Technology, Postal and Courier Services, 2024), and the adoption of the ICT Policy (2022-2027) (Ministry of Information Communication Technology, Postal and Courier Services, 2022) suggest a stronger emphasis on strategic alignment and regulatory coherence. Similarly, the designation of ICT-focused Special Economic Zones, including Sunway City SEZ, and the establishment of institutions such as the Institute of Cyber Security Zimbabwe (ICSZ), point to deliberate efforts to build an enabling ecosystem for digital transformation.

However, these interventions are largely indicative of upstream policy and planning activity rather than demonstrable, large-scale transformation. There is limited evidence to show that these frameworks have translated into improved access to affordable and reliable connectivity, widespread ICT literacy, or meaningful increases in private sector investment. The absence of systematically reported outcomes further constrains the ability to assess impact.

Consequently, progress under this pillar appears to be driven more by policy articulation than by measurable change on the ground, raising concerns about the extent to which NDS1 targets for productivity, formal employment, and improved service delivery through digital technologies are being met. Beyond policy articulation, the real test lies in ensuring that there exists an enabling environment which would ideally translate into measurable, economy-wide digital development outcomes.

Photo by Tanaka Malote

Infrastructure, Housing, and Land Delivery

Under the Infrastructure, Housing, and Land Delivery priority area, the government identified several key commitments aimed at improving service delivery and supporting sustainable development. Land Delivery in NDS1 refers to the systematic release, servicing, and allocation of State land for residential, commercial, and industrial use, primarily to deliver 220,000 housing units over the strategy period through public-private partnerships and self-build schemes. These include:

i. Maintaining and repairing existing infrastructure and equipment
ii. Completing ongoing and stalled projects
iii. Up-scaling Private sector investment in the provision of public infrastructure
iv. Clearing the maintenance backlog in primary, secondary, and feeder road networks
v. Deliver a cumulative 220,000 housing units to be delivered as a function of effective demand during the Strategy Period
vi. Increased regularisation of informal settlements.

The NDS1 priority on Infrastructure, Housing, and Land Delivery reflects a pattern of selective implementation where the government advanced some high-visibility programmes and enabling policies, but deeper structural reforms and several housing and land-delivery commitments remain weakly executed. The overall picture is one of tangible progress on roads and flagship infrastructure such as dams and energy projects, contrasted with more modest or unclear gains in housing finance, rental policy, rail rehabilitation, and systematic land delivery.

One of the key investments under NDS1 infrastructure development was dam *construction*, targeting the initiation and completion of multiple stalled and new projects to bolster water security and irrigation (Phiri, 2025). While work advanced on at least 13 dams, only four (4) dams, Marovanyati, Chivhu, Holy Cross D, and Muchekeranwa, were fully completed and commissioned by December 2025. The remainder, including Kunzvi (69%), Gwayi-Shangani (72%), Tuli Manyange (70%), Semwa

(57%), Zimunya (35%), Vungu (65%), Dande (20%), Bindura (38%), and Silverstroom (38%), lagged significantly behind schedule, underscoring persistent funding shortfalls, procurement delays, and implementation bottlenecks that undermined the strategy's 2025 targets.

The government's launch and subsequent extension of the Emergency Road Rehabilitation Programme 2 (*ERRP2*), alongside the Zimbabwe Infrastructure Investment *Programme* (GoZ, 2021), represented a practical response to NDS1 commitments to maintain, repair, and complete existing infrastructure. However, the majority of national and provincial roads remain in a bad condition. Allocations through the road fund from the Zimbabwe National Road Administration (ZINARA) and ERRP2 indicate focused attention on urban and feeder roads and bridges, consistent with the pledge to clear the maintenance backlog and upgrade selected trunk roads. Although programme-driven rehabilitation strengthened the road network, comprehensive transport reforms outlined in NDS1 lagged. For instance, the modernisation of the public transport system, particularly the integration of mass transit services like buses and commuter trains, and the establishment of a comprehensive regulatory framework to improve efficiency and safety in the transport sector, were not completed. While road rehabilitation projects moved forward, these broader reforms meant to create a more coordinated, reliable, and sustainable transport system have not kept pace with the physical infrastructure upgrades.

Despite visible flagship progress on roads and dams, NDS1 infrastructure investments largely failed to address citizens' top priorities from our annual CPE surveys: employment creation, health service delivery, and tackling corruption. Despite projects such as the Harare-Masvingo-Beitbridge highway and ERRP2, job creation remained negligible, with unemployment targets unmet. Health services were sidelined as investments bypassed clinics and equipment, leaving procurement gaps and poor delivery, while perceptions of corruption worsened - Zimbabwe's 2025 Corruption Perception Index score was 22/100 (Transparency International, 2026).

A further survey by Afrobarometer (*2024*) shows 77% disapproval of the government's handling of poverty, prices, and corruption, underscoring how NDS1's infrastructure focuses privileged elite mobility over broad-based citizens' needs.

Furthermore, the government pursued NDS1's objective of mobilising private and foreign capital for infrastructure, mainly through investment promotion and public-private partnerships. The Zimbabwe Investment and Development Agency (*2025a*), the government's primary investment promotion agency, acting as a "one-stop shop" to facilitate both local and foreign investment, issued a record 709 licences in 2024 across sectors such as real estate and ICT, and entered into high-profile partnerships with *Jindal* (Hwange power plant) and Dangote (cement, power generation, petroleum pipeline), reflecting clear efforts to position infrastructure as an investment opportunity (Muronzi, 2025). By the end of 2025, according to quarterly updates from the same authority, approximately 835 licenses had been issued, marking substantial growth from 267 in 2022 (See Figure 3).

Several of the more systemic housing-finance and land-delivery commitments appear to have seen limited or slow implementation over the NDS1 period. The strategy envisaged reviewing the Rental Policy to attract pension funds into rental accommodation and resuscitating the Housing Guarantee Fund alongside recapitalisation of the Rural Housing Fund and Civil Service Fund.

Prior to NDS1, the country faced a national housing *backlog* estimated at 1.5-2 million units, driven by urban migration, economic crises, and events such as Operation Murambatsvina (Mukarwi et al., 2021). NDS1 made approximately 70% of its revised housing target, but at the same time, it did not completely resolve the housing backlog. At inception, the GoZ set an initial target of 220,000 units; the government reported that it had delivered over 700,000 units by 2024 and later revised ambitions to 1 million. However, it is important to note that the GoZ's target of 1 million units was already lower than the existing pre-NDS1 deficit of 1.5-2 million units. As of December 2025, more than 1 million households remained without adequate housing (Ministry of National

Housing and Social Amenities, *2025*). Moreover, the mortgage market is limited, forcing many to build using their own resources. The housing market tends to be dominated by property developers who secure land from the state or municipalities for further subdivision and selling to individual households. Persistent issues of affordability, quality, and basic servicing (water, electricity, sanitation) mean that numerical progress has not translated into meaningful relief for citizens, leaving the housing crisis largely intact.

The government concentrated on rehabilitating and expanding critical infrastructure and courting investment. In the meantime, progress on the more complex tasks of reforming transport tariffs and governance, deepening housing finance markets, and systematically delivering serviced land and planned settlements lagged behind the original commitments.

Infrastructure, Housing, and Land Delivery Objectives

During the NDS1 Period, effective infrastructure delivery is crucial for achieving national priorities and socio-economic development. Key sectors such as energy, transport, water, sanitation, housing, health, education, and ICTs are essential for economic growth. To address the housing backlog, there will be a focus on providing affordable, quality settlements in urban and rural areas, promoting collaboration among public, private, and non-governmental partners for effective housing delivery.

KEY Target Achieved In Progress Target Missed

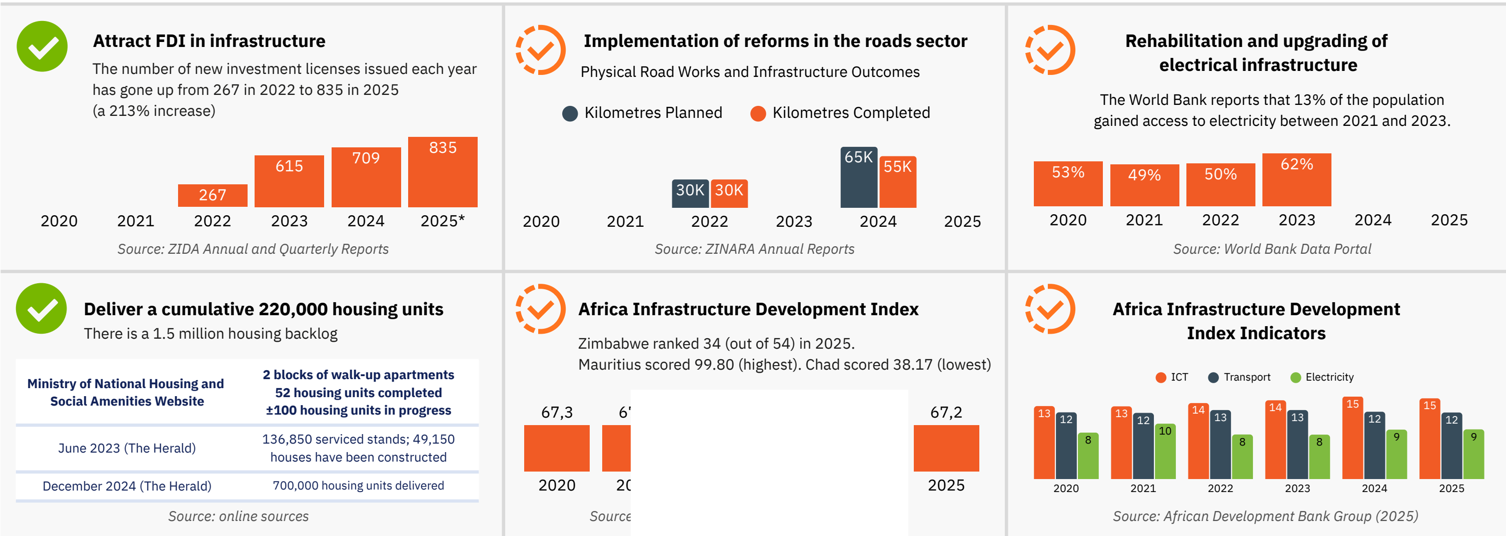

Figure 3: Infrastructure Objectives in NDS1. Data compiled by SIVIO Institute, 2026.

Governance, Devolution and International Engagement

Through the NDS1's Governance, Devolution and International Engagement cluster, the GoZ committed to strengthening democratic institutions, decentralising power to provinces, and re-engaging globally. Key commitments under this cluster include the following:

i. **Devolution**: Operationalise constitutional devolution by allocating at least 5% of national revenues to provincial and local authorities; empower communities in decision-making.

ii. **Public Sector Reform:** Modernise the civil service, enhance efficiency, and digitise government services.

iii. **International Engagement**: Pursue re-engagement with international partners, normalise relations with creditors, and attract foreign investment.

Governance Objectives

The government commits to deepening devolution to enhance citizen participation. At the same time, economic diplomacy under the engagement and re-engagement agenda aims to improve Zimbabwe's global image and attract investment toward Vision 2030.

KEY Target Achieved In Progress Target Missed

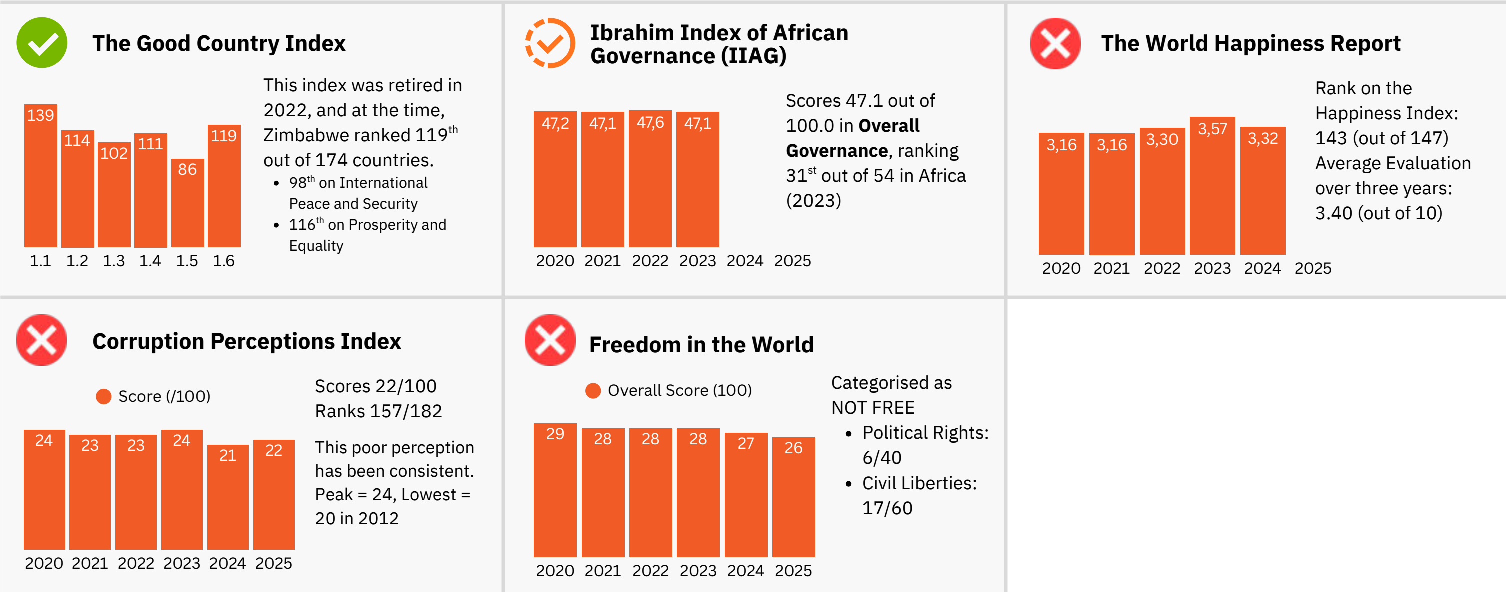

Figure 4: Country Performance Across Various Indices of Governance. Data compiled by SIVIO Institute, 2026

Across several governance indices, Zimbabwe has remained consistent since 2021. Zimbabwe continued to rank low (143/147 in 2024) on the World Happiness Index and is also ranked among those with high levels of corruption (See Figure 4).

The GoZ pledged to review and strengthen procurement systems to enhance transparency and accountability in the management of public resources. Procurement is perhaps one of the most significant challenges within government. For instance, the report by the Auditor General (2025) in relation to procurement for the year ending 31 December 2024 found that 40 vehicles, 17 fire trucks, 83 desktops, 75 laptops and various office furniture items paid for between 2021 and 2024 had still not been delivered as of 30 May *2025*. In response to these challenges, the Cabinet approved the Public Procurement and Disposal of Public Assets Amendment *Bill* in 2025. The Bill introduced stricter regulations to curb nepotism and conflicts of interest in tender processes (GoZ, 2025a). By fortifying the Public Procurement Act and addressing constitutional gaps, this reform seeks to enhance oversight and strengthen the audit environment.

According to NDS1, the government is committed to maintaining Zimbabwe as a unitary and peaceful state. In line with this pledge, the President approved legislation abolishing the death *penalty* on 31 December 2024 (GoZ, 2024a). The reform changed the country's human rights framework, positing it in alignment with constitutional values and international norms.

One of the NDS1 commitments was to improve the ease of doing business in provinces in order to promote inclusive economic growth and attract investment. In pursuit of this goal, the Ministry of Industry and Commerce (2021) developed the 2021-2025 Strategic Plan, providing a comprehensive framework to streamline processes, strengthen provincial business support systems, and guide reforms that enhance competitiveness. In response, the government pursued practical *reforms* such as simplifying business registration and reducing red tape, reviewing and cutting levies and fees in selected sectors, and strengthening provincial and local service-delivery structures to support firms more efficiently (Jeke, 2025).

The government developed the Devolution and Decentralisation Policy, which provides a comprehensive framework for embedding decentralisation principles within ministries and agencies. By April 2025, it had also *deployed* 550 professionals across all 10 provinces to support rural industrialisation and local development. In addition, devolution was supported through national budget allocations, with substantial funds budgeted in recent years for provincial and local authorities, although actual disbursements have often lagged behind allocations. This suggests that while the policy framework and institutional rollout were in place, the progress of devolution has been mixed, with implementation constraints continuing to limit the scale of tangible local service delivery improvements.

One of the commitments made under international reengagement was to bolster and consolidate existing relations with Southern African Development Community (SADC) countries, the African Union, BRICS and its traditional friends. In July 2025, Zimbabwe approved a new Foreign Relations and International Trade *Policy*, a strategic framework designed to boost economic growth, strengthen diplomatic ties, and promote the welfare of Zimbabweans at home and abroad. Immediate outcomes of the new foreign relations and international trade policy have included renewed diplomatic and business engagement platforms, such as the EU-Zimbabwe Business Forum, the Zimbabwe-US Business Forum, and SADC-related ministerial dialogue, which have strengthened coordination and created opportunities for trade and investment discussions.

The GoZ also hosted the SADC and European Union (EU) Ministerial Partnership Dialogue in March 2025, where the two parties engaged on issues of mutual interest, including peace and security, human and sustainable development, climate change, environment, trade and investment. In the same month, Zimbabwe applied to join BRICS, a prominent consortium of emerging economies comprising Brazil, Russia, India, China, and South Africa. This move signalled the country's ambitions to strengthen its global economic and diplomatic standing. Moreover, on the external relations side, renewed joint commissions with Botswana, Zambia, and other partners led to the signing of new MOUs on trade, investment, and related areas, showing stronger diplomatic engagement and institutional coordination.

Taken together, the reforms and initiatives under this cluster reveal a mixed record. While Zimbabwe pursued devolution through skilled professional deployments to local councils and advanced international partnerships via high-level engagements, governance efforts were undermined by actions restricting independent accountability mechanisms, notably the Private Voluntary Organisations (PVO) Amendment *Act* signed into law in April 2025 (GoZ, 2025c).

Social Services and Human Capital

The Social Services cluster of NDS1 was intended to improve the quality of life of Zimbabweans by strengthening access to essential social services, protecting vulnerable groups, and promoting social inclusion. It covered health and well-being, social protection, youth development, sport, and culture, with a strong emphasis on building a healthier, more empowered, and socially cohesive society.

Key commitments under this cluster included:

- Review of the National Health Strategy
- Construction and rehabilitation of Health facilities
- Supporting local drug manufacturing
- Increase access to social care and support services, as well as social insurance coverage
- Promote youth participation in development, and strengthen sport, recreation, cultural, and creative activities

During NDS1, the health sector reform was guided by the new National Health Strategy (*NHS*) 2021-2025, but implementation went beyond strategy formulation to include practical measures aimed at strengthening service delivery and system capacity (Ministry of Health and Child Care, Zimbabwe, 2021a). These included the planned expansion of health facilities in underserved urban growth areas and resettlement zones, the rollout of digital health interventions such as electronic health records, and the scale-up of mental health services (with support from the World Health Organisation (WHO) Zimbabwe) through programs such as *FRIENDZ*, which trained health workers and extended community-based psychosocial support. This strategy was also supported by an *investment* case designed to align health financing with programme-based budgeting and improve outcomes in line with national and the Sustainable Development Goals targets (Ministry of Health and Child Care, 2021b).

The strategy represented a shift from the earlier approach by placing greater emphasis on Universal Health Coverage, health financing, coordination, and system resilience, particularly in response to COVID-19 and persistent structural weaknesses. Its development was therefore not an end in itself, but part of a broader reform agenda intended to guide concrete improvements in service delivery, resource mobilisation, and health system performance.

In terms of local drug manufacturing, the government's *support* focused on creating guaranteed demand for local producers, strengthening regulatory and technical support, and using COVID-19 as a springboard to expand domestic production of essential medicines and medical supplies.

Through a partnership with NMS Infrastructure Limited, the Ministry of Health and Child Care expanded health infrastructure under NDS1 (Kunene, 2024). The first phase of the programme produced four (4) 22-bed health centres: Stoneridge Medical Centre in *Harare*, Cowdray Park Health Centre, *Bulawayo*, Mataga Health Centre, *Mberengwa*, and Runyararo Health Centre, *Chimanimani*. The wider initiative aimed at delivering 30 health centres and five district hospitals by the end of the NDS1 period in December 2025. Strengthening of water, sanitation, and basic services around settlements was also done as part of the broader health and wellbeing pillar. For instance, the allocation of US$1.1 million for the expansion and restoration of both the Parirenyatwa Mental Health Hospital in May *2024* and the Mpilo General Hospital in Bulawayo. Although consolidated national figures for newly established rural health centres are not publicly reported, much of this infrastructure drive is also framed through the National Health Strategy.

In 2001, African Union member states signed the Abuja Declaration, committing to allocate at least 15% of their national budgets to health. During the NDS1 period, Zimbabwe's health budget allocation *fluctuated* but generally remained below the Abuja benchmark. It stood at 10.4% in 2020, rose to 12.9% in 2021, declined to 10.6% in 2022, increased slightly to 11.0% in 2023, and peaked at 14.2% in 2024, before falling back to 10.2% in 2025. This pattern suggests that although health remained a stated fiscal priority, the commitment was not sustained consistently enough to meet the Abuja target or guarantee stable support for service delivery.

During NDS1, the government largely focused on preparatory and enabling measures rather than establishing a fully codified incentive scheme for sport and recreation investment. Recent tax-based *measures*, announced in November 2025, however, mark a shift in this direction (Willie, 2025). For example, businesses that invest in public sports facilities can now claim 150% of their investment as tax savings spread over two years. These actions reflect a gradual move toward structured incentives, clustering around strategic planning, facilitation of public-private partnerships, and emerging tax measures to encourage corporate investment in sports infrastructure.

The government pledged to reconfigure the country's education system with a strong emphasis on Science, Technology, Engineering, Arts, and Mathematics (STEAM) to build a knowledge-driven economy. In pursuit of this vision, the Ministry of Primary and Secondary Education (2025) endorsed the STEM Innovator's *Handbook* Series for schools, integrating STEAM into the competence-based curriculum. This initiative equips learners with practical innovation skills, fosters creativity, and strengthens the foundation for industrialisation and modernisation under Vision 2030.

Addressing Zimbabwe's transition to an upper-middle-income economy by 2030 requires more than identifying skills shortages; it requires translating skills assessments into concrete workforce interventions. In this regard, the government established the Ministry of Skills Audit and Development in September 2023 and, by December 2024, had initiated work on a National Skills Development *Policy* (Moyo, 2026) and a nationwide skills audit to identify critical gaps and support workforce planning. While these steps represent an important institutional response, their real value will depend on whether they lead to practical reforms that align training with labour market needs and help close persistent skills deficits. Overall, the Social Services cluster recorded important policy and institutional reforms during NDS1, but its impact on ordinary citizens' well-being was limited and uneven. Although some health facilities were upgraded and access improved in selected areas, reports such as the Community Working Group on Health (Gonye, *2025*) analysis and Afrobarometer report (Ndoma, *2025*) indicate that persistent medicine stock-outs, inadequate financing below the Abuja benchmark, staffing shortages, and weak service coverage, particularly in rural and low-income communities, continued to undermine healthcare delivery. According to the available evidence, this cluster strengthened the policy framework more than it improved the day-to-day experience of citizens seeking reliable and quality social services.

Photo by Allen Meki

Climate Resilience, Food Systems and Natural Resources Management

NDS1 priorities under this cluster highlight Zimbabwe's commitment to

i. Building resilience against climate change,
ii. Safeguarding natural resources, and
iii. Strengthening food systems for sustainable development.

It reflects efforts to promote climate-smart agriculture, enhance disaster preparedness, and ensure the sustainable management of land, water, and biodiversity. At its core, the cluster underscores the link between environmental stewardship and human wellbeing, recognising that resilient ecosystems and secure food systems are essential for inclusive growth, poverty reduction, and national stability.

The government has stated its commitment to promoting weather-based agriculture by localising seasonal forecasts and developing insurance mechanisms for smallholder farmers. In pursuit of this, it invested in upgrading the national hydro-meteorological observation network by procuring five weather radars to improve spatial coverage and the accuracy of rainfall forecasts (Meteorological Services Department, *2025*).

Complementing this, the Government scaled up the Pfumvudza/Intwasa conservation agriculture programme as a core drought-proofing measure, explicitly framed as a climate-smart response to below-normal rainfall seasons. Together, these initiatives were intended to help strengthen farmers' resilience by combining improved weather information with adaptive agricultural practices.

The government established an agricultural revolving fund with appropriately structured lines of credit to support farmers and strengthen food security. In January 2024, the Agricultural Finance Corporation (AFC), Land and Development Bank of Zimbabwe, in partnership with the Food and Agriculture Organisation (FAO) and the government, *launched* a new loan management and e-voucher system (FAO, 2024). This innovation enhances the efficiency of affordable financing delivery, facilitates access to inputs such as fertiliser, and supports cereal and oilseed production. By modernising credit delivery and linking it to policy support, the initiative advances the revolving fund commitment and contributes to food self- sufficiency and resilience among Zimbabwean farmers.

To expand access to increased food self-sufficiency from 45% to 100% and reduce food insecurity from the 59% recorded in 2020, the government in March 2024 *allocated* ZWL$44 billion (US$2,807,422[1]) to facilitate the delivery of 71,500 tonnes of maize, sorghum, and millet to approximately 2.7 million people across 59 districts identified in the national crop assessment (Chronicle, 2024). This intervention provided immediate relief to vulnerable households, reduced hunger, and stabilised food availability (Veritas, *2024*). While primarily a short-term measure, it complements broader strategies aimed at achieving long-term food self-sufficiency and resilience. Since 2021, the average food sufficiency levels across wheat, maize, soya beans and sorghum dropped from 69% to 56% in 2024. This largely due to a poor maize crop in 2024 caused by the El Niño-induced drought. Before that, in 2023, the level had risen to 82% (See Figure 5).

One of the NDS1 commitments was to review and implement forestry policies and legislation to strengthen environmental stewardship and sustainable resource management. In May 2023, the government launched the National Forest *Policy* (GoZ, 2023b), a comprehensive framework designed to maintain forest integrity, devolve management responsibilities to local communities, and enhance forest carbon sinks as part of climate resilience efforts. By modernising forestry governance and embedding sustainability principles, the policy advances national development goals while safeguarding biodiversity and promoting equitable benefit-sharing.

Zimbabwe has advanced climate-smart agriculture, strengthened forecasting systems, and modernised resource policies to safeguard livelihoods and ecosystems. These measures enhance food security, resilience to climate shocks, and inclusive rural development. However, greater emphasis is still needed on aligning short-term relief with long-term structural reforms to fully achieve food self-sufficiency and sustainable resource management.

Food and Nutrition Security Objectives

The NDS1 aims to enhance food self-sufficiency and maintain the country's regional breadbasket status. The main objective is to increase food self-sufficiency from the current level of 45% to 100% and reduce food insecurity from the current peak of 59% in 2020 to less than 10% by 2025.

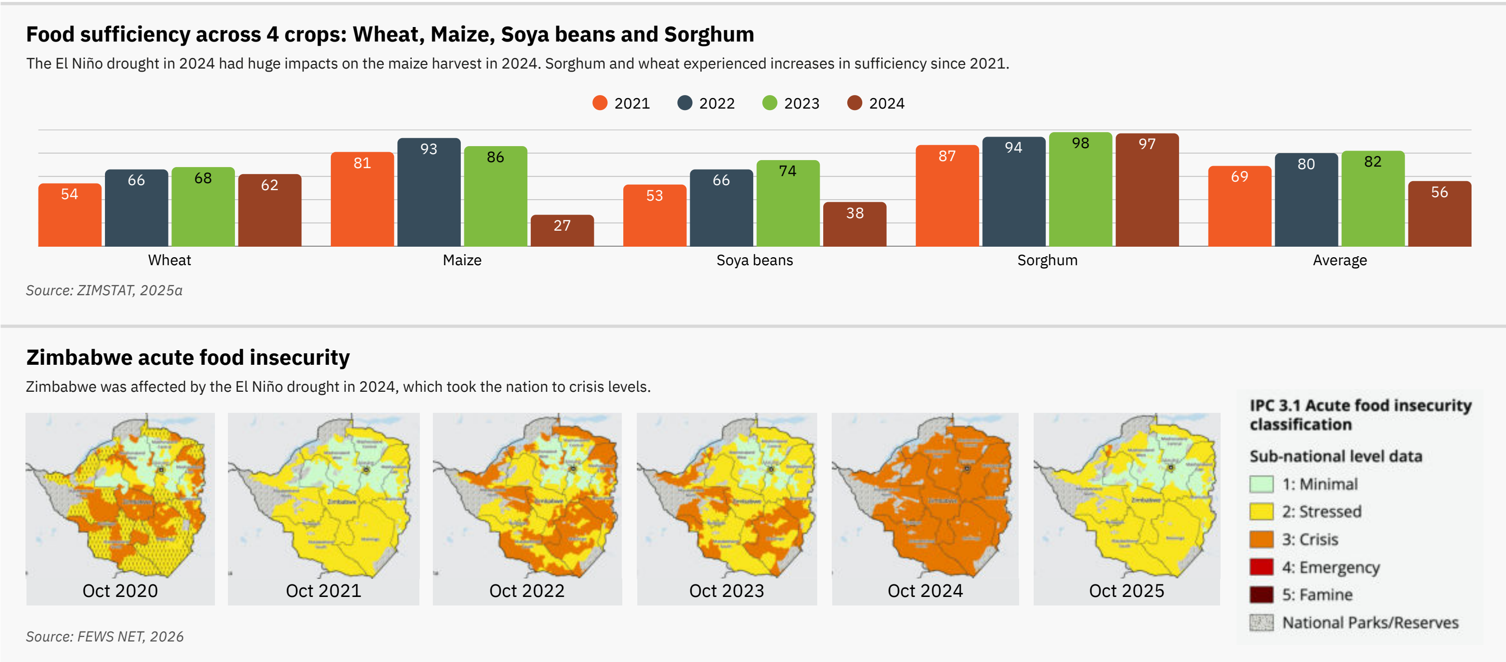

Figure 5: Food and Nutrition Security Objectives in NDS1. Data compiled by SIVIO Institute, 2026

[1] *RBZ Exchange Rate - 5 March 2024*

Findings across the five clusters point to a mixed implementation record. There was significant progress recorded under infrastructure, mining, and selected policy reforms, while a few actions which were recorded under governance, debt resolution, and social protection remained less consistent. This pattern underscores the importance of assessing NDS1 not only by the number of actions taken, but by the extent to which those actions responded to citizens' priorities and produced tangible improvements in everyday life. The lessons learnt draw from this uneven performance and highlight the issues that should inform Zimbabwe's next phase of national development.

LESSONS LEARNT

Figure 6: Lessons Learnt

1. Infrastructure investments must be matched with industrialisation and inclusive growth.

There was visible but unevenly distributed progress in roads, energy, and dam construction, demonstrating the value of targeted capital investments. However, these gains were not complemented by equivalent advances in industrialisation, SME support, and job creation, leaving growth lopsided and failing to address citizens' top priority of employment. The second National Development Strategy (NDS2) should rebalance by linking infrastructure to firm productivity, exports, and broad-based economic participation.

2. Fiscal and debt constraints require innovative domestic resource mobilisation.

Persistent debt arrears and limited concessional financing constrained NDS1's scale and pace. While macroeconomic stability improved, fiscal space remained tight, undermining social services delivery and poverty reduction. Future strategies must establish transparent channels for domestic savings, local investment, and diaspora capital to fund productive infrastructure and human capital development.

3. Devolution needs operationalisation beyond policy frameworks.

While devolution policies were developed and professionals deployed to provinces, meaningful resource transfers and local capacity building lagged. NDS2 should prioritise rule-based fiscal devolution, performance benchmarks, and constitutional alignment to ensure equitable development and citizen empowerment at the local level.

4. Social services reforms must prioritise service delivery outcomes over policy development.

Health sector strategies and infrastructure partnerships advanced, but medicine shortages, staffing gaps, and funding below the Abuja benchmark persisted, limiting citizen wellbeing. Lessons emphasise translating policy intent into measurable improvements in access, quality, and equity, particularly for rural and vulnerable populations.

5. Strategic selectivity risks missing citizen priorities.

NDS1 excelled in high-visibility areas such as roads but underperformed in governance accountability, housing delivery, and social protection. Aligning implementation with citizen expectations from, for instance, our Citizens' Perceptions and Expectations surveys would have led decision-makers to consider employment, health, and anti-corruption as priorities. These issues remain critical for NDS2's legitimacy and impact.

CONCLUSION

The NDS1 period (2021-2025) demonstrates a mixed legacy of visible infrastructure gains alongside persistent structural gaps. Road rehabilitation and selected energy projects advanced, supported by investment mobilisation and policy frameworks on disability inclusion and climate adaptation. However, housing delivery, land regularisation, and systemic reforms in transport and housing finance remained weakly executed, leaving core commitments underachieved.

Overall, NDS1 provided important groundwork in macroeconomic stabilisation (inflation, exchange rate, fiscal discipline), infrastructure renewal in transport and energy, and institutional frameworks for housing and land delivery, but its outcomes were uneven and constrained by debt, inflation, and climate shocks. The evidence suggests that while progress was tangible in certain high-visibility areas, broader citizen-focused goals of affordable housing, resilient infrastructure, and systematic land delivery were not fully realised, underscoring the need for sharper implementation in successor strategies.

REFERENCES

Afrobarometer. (2024, October 25). Zimbabweans score their government poorly on job creation and other priority problems, Afrobarometer survey shows. *https://www.afrobarometer.org/wp-content/uploads/2024/10/News-release_Zimbabweans-score-government-poorly-on-priority-problems-Afrobarometer-25Oct24.pdf*

Al Jazeera. (2024, April 5). Zimbabwe introduces new gold-backed currency to tackle inflation. *https://www.aljazeera.com/news/2024/4/5/zimbabwe-introduces-new-gold-backed-currency-to-tackle-inflation*

Auditor General. (2025). Report of the Auditor-General for the Year Ended 2024 on Appropriation Accounts, Finance and Revenue Statements and Fund Accounts. *https://www.veritaszim.net/node/7635*

Chamber of Mines. (2023). 2022 Annual Report. *https://chamines.co.zw/assets/uploads/2023/application/3bb36313-f1fc-470d-81fe-dd628d9a2694.pdf*

Chikohomero, R. & Nyoni, R. (2024, April 19). *Zimbabwe's new ZiG doomed by overall lack of transparency.* Institute for Security Studies. *https://issafrica.org/iss-today/zimbabwe-s-new-zig-doomed-by-overall-lack-of-transparency*

Chikweche, T., Chaora, B., & Cross, R. (2023). *Financial Inclusion in Zimbabwe: Re-imagining Prospects for Inclusive Stakeholder Involvement and National Development.* African Journal of Inclusive Societies, 2(1). *https://doi.org/10.59186/SI.7GSFPXQO*

Chronicle. (2024, March 5). Grain movement to All food-insecure people must be expedited. *https://www.heraldonline.co.zw/comment-grain-movement-to-all-food-insecure-people-must-be-expedited/*

Consumer Council of Zimbabwe. (2022). Consumption of local products way to go. Newziana. *https://newziana.co.zw/consumption-of-local-products-way-to-go/*

Delbarre, J. (2025). *Facts about poverty in Zimbabwe.* Borgen Project. *https://borgenproject.org/facts-about-poverty-in-zimbabwe/*

Famine Early Warning System Network (FEWS NET). (2026). Zimbabwe: Latest food security analysis. *https://fews.net/southern-africa/zimbabwe*

Feingold, S. (2024, May 17). *The ZiG: Zimbabwe rolls out world's newest currency. Here's what to know.* World Economic Forum. *https://www.weforum.org/stories/financial-and-monetary-systems/zimbabwe-zig-new-currency-inflation-dollar/*

Food, Agriculture & Natural Resources Policy Analysis Network (FANRPAN). (2022). Promoting private sector investment: Zimbabwe's legal and regulatory framework. *https://fanrpan.org/wp-content/uploads/2025/04/FANRPAN_PB_PrivateSectInvest_Zimbabwe_2022.pdf*

Food and Agriculture Organisation (FAO). (2024, January 31). FAO and AFC Land and Development Bank of Zimbabwe launch new loan management and e-voucher system. *https://www.fao.org/africa/news-stories/news-detail/FAO-and-AFC-Land-and-Development-Bank-of-Zimbabwe-launch-new-loan-management-and-e-voucher-system/en*

Gonye, V. (2025, March 4). *Abuja Declaration target remains a pipe dream for Zimbabwe.* Community Working group on Health. *https://www.cwgh.co.zw/abuja-declaration-target-remains-a-pipe-dream-for-zimbabwe/*

Government of Zimbabwe. (2020). *National Development Strategy 1.* Veritas Zimbabwe. *https://www.veritaszim.net/node/4583*

Government of Zimbabwe. (2021). 2021 Zimbabwe Infrastructure Investment Programme. *https://veritaszim.net/sites/veritas_d/files/2021%20Zim%20Infrastructure%20Investment%20Programme.pdf*

Government of Zimbabwe. (2023a). Finance Act No. 13 of 2023. *https://www.veritaszim.net/sites/veritas_d/files/Finance%20Act%202024%20Act%2013%20of%202023.pdf*

Government of Zimbabwe. (2023b, May). National Forest Policy. *https://faolex.fao.org/docs/pdf/zim224144.pdf*

Government of Zimbabwe. (2023c). Mid-term review January 2021-June 2023. *https://zimtreasury.co.zw/wp-content/uploads/2023/12/Mid-Term-Review.pdf*

Government of Zimbabwe. (2024a). Death Penalty Abolition Act [Chapter 9:26]. Veritas. *https://www.veritaszim.net/sites/veritas_d/files/Death%20Penalty%20Abolition%20Act%2C%20%20Act%20No.%204%20of%202024.pdf*

Government of Zimbabwe. (2024b). *Communiqué of the High-Level Structured Dialogue Platform Forum: Zimbabwe arrears clearance and debt resolution process (25 November 2024).* Ministry of Finance, Economic Development and Investment Promotion. *https://zimtreasury.co.zw/wp-content/uploads/2024/12/COMMUNIQUE-HIGH-LEVEL-STRUCTURED-DIALOGUE-PLATFORM-FORUM-held-on-25-NOVEMBER-2024.pdf*

Government of Zimbabwe. (2025a, March). Public Procurement and Disposal of Public Assets Amendment Bill. *https://www.veritaszim.net/sites/veritas_d/files/Public%20Procuremt%20%26%20Disposal%20of%20Public%20Assets%20Bill%20%28HB%202%2C2025%29.pdf*

Government of Zimbabwe. (2025b, July). Foreign Relations and International Trade Policy. *https://newsreelzimbabwe.co.zw/2025/07/31/zimbabwe-approves-new-foreign-relations-and-international-trade-policy-to-drive-development-and-re-engagement/*

Government of Zimbabwe. (2025c). Private Voluntary Organisations Amendment Act, 2025. Veritas. *https://www.veritaszim.net/node/7419*

International Monetary Fund (IMF). (2025, June 18). IMF Staff Completes 2025 Article IV Mission to Zimbabwe. *https://www.imf.org/en/news/articles/2025/06/18/pr-25203-zimbabwe-imf-completes-2025-article-iv-mission*

International Trade Centre. (2023, October). Promoting SME Competitiveness in Zimbabwe: Drive growth through business networks and technology. *https://www.intracen.org/file/promotingsmecompetitivenessinzimbabwedrivegrowththroughbusinessnetworksandtechnologypdf*

Jeke, O. J. (2025, July 30). Govt revises business sector levies. Zimbabwe Now. *https://zimbabwenow.co.zw/articles/15757/govt-revises-business-sector-levies*

Kanyemba, B. (2025, October 28). *The IMF's Rosy Projections for Zimbabwe: A Facade of Stability?* Equity Axis. *https://www.equityaxis.net/post/18628/2025/10/the-imf-s-rosy-projections-for-zimbabwe-a-facade-of-stability*

Kose, M. A., & Ohnsorge, F. (Eds.). (2023). *Falling long-term growth prospects: Trends, expectations, and policies.* World Bank. *https://doi.org/10.1596/978-1-4648-2000-7*

Kunene, M. (2024, June 21). Ministry of Health's NMS Infrastructure partnership bearing fruit. *https://www.heraldonline.co.zw/ministry-of-healths-nms-infrastructure-partnership-bearing-fruit/*

Labour and Economic Development Research Institute of Zimbabwe (LEDRIZ). (2020). Critical discourse assessments of the Transitional Stabilisation Programme. *https://kubatana.net/2020/08/20/review-of-the-transitional-stabilisation-programme-tsp/*

Manomano, P. (2025, October 31). Pfumvudza/Intwasa plots prepared. The Herald. *https://www.heraldonline.co.zw/eight-million-pfumvudza-intwasa-plots-prepared/*

Meteorological Services Department. (2025, March). Newsletter: Closing the early warning gap. *https://www.weatherzw.org.zw/documents/241/MSD_Newsletter_March_2025.pdf*

Midzi, N., Haruzivishe, C., Gonese, E., Sembuche, S., Mutsaka-Makuvaza, M. J., Ayebare, R., Muwonge, T., Nakasendwa, S., Mateta, C., Madanhire, T., Chaibva, C. N., Gwatiringa, C., Mutsaka, K., Phiri, I., Abdulaziz, M., Kabwe, P. C., Dube-Mawerewere, V., Tajudeen, R., Fallah, M. P., & Dobbie, M. (2025).Impact of COVID-19 on healthcare programs in Zimbabwe: a mixed methods study. *BMC Public Health, 25*, 1749. *https://doi.org/10.1186/s12889-025-22791-4*

Ministry of Finance and Economic Development. (2023a, June). Economic and Fiscal Report for the Year 2022. *https://zimtreasury.co.zw/wp-content/uploads/2025/03/2022_Annual_Review_Final_30-June_2023.pdf*

Ministry of Finance and Economic Development. (2023b). *Results Based Budgeting (RBB): Policy and technical guidelines.* Government of Zimbabwe. https://zimtreasury.co.zw/wp-content/uploads/2024/10/Results-Based-Budgeting_Policy-and-Technical-Guidelines.pdf

Ministry of Finance and Economic Development. (2024, April 10). *Statement on the introduction of the new currency (ZiG).* Veritas Zimbabwe. https://www.veritaszim.net/sites/veritas_d/files/Min%20Statement%20FEDIP%202024-04-10%20-%20New%20Currency.pdf

Ministry of Finance and Economic Development. (2025). Public debt report. https://zimtreasury.co.zw/wp-content/uploads/2025/11/Public-Debt-Report-End-Sep2025.Zimtreasury.pdf

Ministry of Health and Child Care, Zimbabwe. (2021a). National Health Strategy (NHS) 2021-2025. https://faolex.fao.org/docs/pdf/zim225019.pdf

Ministry of Health and Child Care, Zimbabwe. (2021b). Investment Case for the National Health Strategy 2021-2025. https://www.globalfinancingfacility.org/sites/default/files/Zimbabwe-GFF-Investment-Case.pdf

Ministry of Industry and Commerce. (2021). 2021-2025 Strategic Plan. https://www.mic.gov.zw/wp-content/uploads/2024/12/Reviewed-2025-Latest-04-Dec-MIC-Strategic-Plan-.pdf

Ministry of Industry and Commerce. (2025). *Progress report on the Zimbabwe Industrial Reconstruction and Growth Plan (04 August 2025).* Government of Zimbabwe. https://www.mic.gov.zw/wp-content/uploads/2026/01/PROGRESS-REPORT-ON-THE-ZIMBABWE-INDUSTRIAL-RECONSTRUCTION-AND-GROWTH-PLAN-04-08-25.pdf

Ministry of Information Communication Technology, Postal and Courier Services. (2022). National ICT Policy 2022–2027. Government of Zimbabwe. https://www.ictministry.gov.zw/assets/documents/National%20ICT%20Policy%202022-2027.pdf

Ministry of Information Communication Technology, Postal and Courier Services. (2024). Smart Zimbabwe 2030 Master Plan. Government of Zimbabwe. https://www.ictministry.gov.zw/assets/documents/Smart%20Zimbabwe%202030%20Master%20Plan.pdf

Ministry of National Housing and Social Amenities. (2025). Zimbabwe National Human Settlements Policy continues to bear fruit. https://www.nationalhousing.gov.zw/?news=zimbabwe-national-human-settlements-policy-continues-to-bear-fruit

Ministry of Primary and Secondary Education. (2025, June 27). *STEM Innovator's Handbook Series approval letter.* Skool21. https://skool21.org/wp-content/uploads/2025/07/All-communications-should-be-addressed-to-the.pdf

Moyo, S. (2024, May 3). *Kombi operators reject ZiG.* The Chronicle. https://www.heraldonline.co.zw/kombi-operators-reject-zig/

Moyo, S. (2026, April 25). *New skills audit policy to align education with industry needs.* Zimbabwe Situation. https://www.zimbabwesituation.com/news/new-skills-audit-policy-to-align-education-with-industry-needs/

Mukarwi, W., Mukarwi, L. & Dube, T. (2021). Africa Housing Finance Yearbook: Zimbabwe. https://housingfinanceafrica.org/wp-content/uploads/2025/01/Zimbabwe.pdf

Muronzi, C.T. (2025, September 17). *Zimbabwe agrees $455 million power plant refurbishment deal with Jindal.* Reuters. https://www.reuters.com/sustainability/boards-policy-regulation/zimbabwe-agrees-455-million-power-plant-refurbishment-deal-with-jindal-2025-09-17/

Mutengezanwa, M., Mauchi, F.N., Njanike, K., Matanga, J., & Gopo, R.N. (2012). The Possibility of Reintroducing the Zimbabwean Dollar. *Australian Journal of Business and Management Research, 2(6), 1-8.* https://www.ajbmr.com/articlepdf/aus-20-78i6n2a1.pdf

Ndoma, S. (2025, May 29). *Zimbabweans worry about access to medical care amidst widespread lack of medical aid coverage.* Afrobarometer *https://www.afrobarometer.org/publication/ad990-zimbabweans-worry-about-access-to-medical-care-amidst-widespread-lack-of-medical-aid-coverage/*

New Zimbabwe. (2026, January 2). Finance Minister Mthuli Ncube failed to deliver the promised 760,000 jobs, says ZCTU. *https://www.newzimbabwe.com/finance-minister-mthuli-ncube-failed-to-deliver-the-promised-760000-jobs-says-zctu/*

Nyeve, R. (2025, September 3). Hwange Units 7 and 8 hits record production. The Herald. *https://www.heraldonline.co.zw/hwange-units-7-and-8-hits-record-production/*

Phiri, J. (2025, November 24). *Dam-driven economy at centre of next agric plan.* Zimbabwe Situation. *https://www.zimbabwesituation.com/news/dam-driven-economy-at-centre-of-next-agric-plan/*

Reserve Bank of Zimbabwe (RBZ). (2024, April). Ministerial statement on the introduction of Zimbabwe Gold (ZiG). *https://www.rbz.co.zw/documents/mps/2024/2024_Monetary_Policy_Statement_at_a_Glance.pdf*

Siamilandu, O. (2025, May 26). *Govt reviews ICT standards to boost digitalisation.* Newsday. *https://www.newsday.co.zw/local-news/article/200042263/govt-reviews-ict-standards-to-boost-digitalisation*

Sibesha, K., Ndlovu, N., & Jowah, E. (2025). *2025 Citizens Pulse: Views, Priorities, and Expectations of the Government of Zimbabwe.* SIVIO Institute. *https://doi.org/10.59186/SI.3ELUE8MT*

SIVIO Institute. (2022-2026). African Citizens Watch. *https://www.africancitizenswatch.org/*

SIVIO Institute. (2022-2025). Zim Citizens Watch platform. *https://www.zimcitizenswatch.org*

Trading Economics. (2026). Zimbabwe Inflation Rate. *https://tradingeconomics.com/zimbabwe/inflation-cpi*

Transparency International. (2026). Corruption Perception Index. *https://www.transparency.org/en/cpi/2025*

United Nations Department of Economic and Social Affairs (UN DESA). (2023). Zimbabwe Pfumvudza Programme. *https://sdgs.un.org/partnerships/zimbabwe-pfumvudza-programme*

Veritas. (2024, June 18). Zimbabwe cabinet 18th post-cabinet briefing. *https://www.veritaszim.net/sites/veritas_d/files/18th%20Post%20Cabinet%20Briefing%202024.pdf*

Willie, L. (2025, November 28). *Mthuli Ncube Announces New Measures to Revive Sports Facilities.* Hurumende. *https://hurumende.com/mthuli-ncube-announces-new-measures-to-revive-sports-facilities/*

World Bank. (2020). Reversing the Tide: Reducing poverty and boosting resilience in Zimbabwe. *https://documents1.worldbank.org/curated/en/099925110032237739/pdf/P1767360af8e5705a089bd086ffbfec43ab.pdf*

World Bank. (2022, October). Boosting productivity and quality jobs. *https://documents1.worldbank.org/curated/en/099515010132227870/pdf/P1776070fe5e0c073087e00e3c04ec11f6e.pdf*

World Bank. (2024). Zimbabwe macro poverty outlook (ZMPO). *https://documents.worldbank.org/en/publication/documents-reports/documentdetail/099548510162442301*

World Bank. (2025, December 2). Zimbabwe Economic Update 2025: Fostering a Business-Enabling Regulatory Environment for Private Sector Growth. *https://www.worldbank.org/en/news/feature/2025/12/02/zimbabwe-economic-update-2025-fostering-a-business-enabling-regulatory-environment-for-private-sector-growth*

World Bank. (2026a, April). Macro Poverty Outlook. *https://thedocs.worldbank.org/en/doc/bae48ff2fefc5a869546775b3f010735-0500062021/related/mpo-zwe.pdf*

World Bank (2026b). GDP growth (annual %) - Zimbabwe [Data]. *https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=ZW*

ZB Financial Holdings. (2025). Monthly Economic Update. August 2025. *https://www.zb.co.zw/holding/sites/default/files/2025-10/Monthly%20Economic%20Update%20-%20August%202025.pdf*

Zimbabwe Coalition on Debt and Development (ZIMCODD). (2020). Socio-economic justice analysis of the Transitional Stabilisation Programme. *https://zimcodd.org/wp-content/uploads/2020/02/Citizen-Perspective-Transitional-Stabilisation-Programme.pdf*

Zimbabwe Coalition on Debt and Development (ZIMCODD). (2021). 2021 Annual Debt Management Report for Zimbabwe. *https://zimcodd.org/wp-content/uploads/2022/05/The-2021-Annual-Debt-Management-Report-for-Zimbabwe.pdf*

Zimbabwe Investment and Development Agency (ZIDA). (2025a). Annual Report 2024. *https://zidainvest.com/wp-content/uploads/2025/07/ZIDA-2024-ANNUAL-REPORT-FOR-WEB.pdf*

Zimbabwe Investment and Development Agency (ZIDA). (2025b). Quarter Three Report 2025. *https://zidainvest.com/wp-content/uploads/2025/10/ZIDA-QUARTERLY-REPORT-Q3-2025-WEB-1.pdf*

Zimbabwe Livelihoods Assessment Committee. (2024). Rural Livelihoods Assessment Report. *https://www.fnc.org.zw/wp-content/uploads/2024/07/2024-ZimLAC-Rural-Livelihoods-Assessment-Report.pdf*

Zimbabwe National Chamber of Commerce (ZNCC). (2025, December 1). 2026 National Budget Analysis & Review. *https://www.zncc.co.zw/images/2026_National_Budget_Statement_Analysis_and_Review.pdf*

Zimbabwe National Statistics Agency (ZIMSTAT). (2020). Zimbabwe poverty update 2017-2019. *https://www.zimstat.co.zw/wp-content/uploads/Macro/Poverty_Statistics/Zimbabwe_PovertyUpdate_2017-2019_WEBB_Final.pdf*

Zimbabwe National Statistics Agency (ZIMSTAT). (2025a). Food Balance Sheet 2021-2024. *https://zimstat.co.zw/wp-content/uploads/production/foodbalance/ZIMBABWE_FBS_REPORT_2024_FINAL.pdf*

Zimbabwe National Statistics Agency (ZIMSTAT). (2025b). Preliminary Report of the 2023 Economic Census. *https://www.zimstat.co.zw/wp-content/uploads/production/EconomicCensus/EC2025_PRESENTATION.pdf*

Zimbabwe National Statistics Agency (ZIMSTAT). (2025c). 2025 Second quarter labour force survey report. *https://www.zimstat.co.zw/wp-content/uploads/Macro/Labor-force/2025/Q2_2025_QLFS_Report.pdf*

Zimbabwe National Statistics Agency (ZIMSTAT). (2025d). ZWG consumer price index December 2025. *https://www.zimstat.co.zw/wp-content/uploads/Macro/Prices/CPI/2025/CPI_ZWG_12_2025.pdf*

ANNEX

Cluster	NDS1 Priorities	Score
Macroeconomic Management and External Sector	Increased use of Zimbabwe dollar as the dominant legal tender by 2025	53%
	Operationalise Industrial Parks to commercialise prototypes	
	Strengthening and establishment of Special Economic Zones	
	Create at least 760,000 formal jobs over the five-year NDS1 period	
	Achieve increased per capita income to around US$3,200 by 2025	
	Grow the economy at an average growth rate of above 5% per annum between 2021 and 2025	
	Reducing public debt to below 70% of GDP	
	Reviewing and streamlining tax incentives	
	Formalising the informal sector	
	Strictly adhere to the approved budget and stop accumulation of arrears	
	Maintain a sustainable current account balance of not more that -3% of GDP	
	Build foreign reserves to around six months of import cover by 2025	
	Maintain fiscal deficits averaging not more than 3% of GDP in line with SADC targets	
	Promotion of export products and export markets diversification	
	Implementation of reforms aimed at streamlining and simplifying exporting and importing procedures	
	Eliminating customs delays and improving customs administration	
	Review the subsidy policy to ensure better targeting, fast-track State Enterprise and Parastatal reforms	
	Full rollout of the Public Finance Management System to ensure full utilisation	
	Limit recourse to Central Bank borrowing and listing of Bonds on the Securities Exchange Market	
	Reducing inflation to single-digit levels by 2025	
	Implementation of Financial Sustainability Standards	
	Full implementation of Basel III accord	
	Operationalisation of the Collateral Registry	
	Come up with a comprehensive financial sector development strategy	
	ICT Infrastructure Development and Maintenance	
	Implementation of Ease of Doing Business reforms in ICTs	
	Implementation of Special Economic Zones for ICTs	
	Implementation of ICT Literacy Research and Development Programme	
	Enforcement of ICT sector policies and regulations	

Cluster	NDS1 Priorities	Score
Infrastructure, Housing, and Land Delivery	Maintaining and repairing existing infrastructure and equipment	58%
	Completing on-going and stalled projects	
	Attract FDI in infrastructure	
	Up-scaling Private sector investment in the provision of public infrastructure	
	Promoting facilities that cater for people with disabilities	
	Promoting research and development in infrastructure	
	Capacitating implementing agencies	
	Designing and implementing climate proofing and resilient infrastructure; and Promoting infrastructure sharing	
	Clearing the maintenance backlog in primary, secondary and feeder road networks	
	Upgrading of unpaved trunk roads to surfaced standards including uncompleted bridge construction along highly trafficked roads to prevent further loss	
	Implementation of reforms in the roads sector to align Zimbabwe more closely with the requirements of the SADC Protocol on Transport, Communications and Meteorology	
	Review the current road user fees with the objective of ensuring cost recovery and re-investment in the road infrastructure	
	Rehabilitation and upgrading of track infrastructure	
	Rehabilitation and upgrading of signal and communication equipment	
	Rehabilitation and upgrading of electrical infrastructure	
	Deliver a cumulative 220,000 housing units to be delivered as a function of effective demand during the Strategy Period	
	Increased regularisation of informal settlements	
	Increased access to housing finance	
	The Rental Policy will be reviewed in order attract Pension Funds to invest in rental accommodation	
	The government will resuscitate the Housing Guarantee Fund (HGF), and recapitalise the Rural Housing Fund and Civil Service Fund	
	The government will secure accommodation for public sector employees	
	The government will, within the urban setup, acquire 10,000 hectares for housing development	
	Deliver 124 villagised and planned settlements	
	Capacity building for personnel in the relevant institutions responsible for land delivery	

Cluster	NDS1 Priorities	Score
Governance, Devolution and International Engagement	Increase Critical Skilled Experts Available from 38% in 2020 to 51% by 2025	62%
	Improve on the Good Country Index from 100/153 in 2020 to 90/153 by 2025	
	Improve on the Country Brand Ranking from 120/189 in 2020 to 100/189 by 2025	
	Improve on the Global Happiness Index from 146/191 in 2020 to 100/191 by 2025	
	Reconfigure and Internationalise Higher and Tertiary Education to attract more foreign students	
	Bolster and consolidate existing relations with countries with SADC countries, the African Union, BRICS and its traditional friends	
	Continue to engage and re-engage international community	
	Fast-track the resolution and ratification of outstanding Bilateral	
	Investment Promotion and Protection Agreements (BIPPAs)	
	Prioritise re-joining the Commonwealth as a launch pad to unlock international goodwill	
	Maintain at least 5% of national revenues to intergovernmental fiscal transfers	
	Formulation and enactment of the necessary legal framework	
	Improve the Ease of Doing Business in Provinces	
	Promote investment to attract local and foreign investment	
	Enabling the development of revenue streams and effective collection mechanisms;	
	Mainstreaming the Devolution concept in all sectors of Government	
	Enforcement of financial management policies in the usage of devolution funds	
	Crafting investor friendly policies to promote devolution	
	Review and strengthen audit delivery systems	
	Maintain Zimbabwe as a Unitary peaceful state	
	Implement a new culture in the management of public affairs and resources in local government structures	
	Maintain at least 5% of total national revenue for allocation to lower tiers of Government	
	Improve governance and accountability in the lower tiers of Government	
	Accelerating implementation of an integrated e-Government system, including alignment of the PFM legal framework with Zimbabwe's Constitution	
	Strengthen financial oversight of Local Authorities and, State Enterprises and Parastatals (SEPs)	
	Strengthening fiscal transparency through budgeting and expenditure reforms	
	Improving access to courts by people with disabilities	
	Decentralise state institutions responsible for Justice Delivery (Legal Aid Directorate and courts)	
	Effecting necessary amendments to the already existing legislation in line with the Constitution	

Cluster	NDS1 Priorities	Score
Social Services and Human Capital	Increase the number of people (men, women, persons with disabilities and children of all ages) receiving social assistance across all the social protection interventions from 65% in 2020 to 85% by 2025	54%
	Increase proportion of population with access to social care and support services from 15% in 2020 to 75% by 2025	
	Increase social insurance cover to 67% by 2025	
	Increase Livelihoods support from 3% to 17% by 2025	
	Strengthen social protection delivery systems inclusive of shock responsiveness	
	Introduction of old age and children grants	
	Support safe spaces for pregnant women at Maternity Waiting Homes including provision of food	
	Increase the number of households supported with livelihoods initiatives from 5% to 25%	
	Provision of food assistance, social cash transfers, health assistance, holistic education support including school feeding and provision of sanitary wear for female learners in schools	
	Increase the number of locally produced Essential Medicines from 30% to 60% of the essential medicines list by 2025	
	Reduce the medicines import bill from US$220.4 million in 2020 to US$100.4 million by 2025	
	Promote public procurement of locally produced medicines	
	Harmonisation of the Public Health Policy and Industrial Development Policy	
	Review the list of medicines requiring import licenses in line with domestic production capacities	
	Capacity building of key public institutions, including MCAZ, schools of Pharmacy and AiBST	
	Construction and rehabilitation of Health facilities	
	Develop and implement a Health Sector Coordination Framework	
	Implement cross subsidization of Health Insurance Benefit schemes	
	Implement single spine remuneration scheme for health care workers	
	Strengthen training of health professionals to international standards	
	Accelerate restructuring of Ministry of Health and Child Care (MoHCC) and the Health Service Board (HSB) to be fit for purpose	
	Supporting local drug manufacturing	
	Increase Public Health Expenditure Per Capita from USD$30.29 in 2020 to USD$86 by 2025	
	Review the National Health Strategy	
	Culture Sports and Recreation skills development	
	Establish community clubs that promote healthy lifestyles	
	Establish community nutritional programmes and community support groups	
	Develop and implement a robust cultural diplomacy policy	
	Increasing youth participation in decision-making and development processes from 3.3% in 2020 to 25% by 2025	
	Increasing the number of youth who accessed empowerment opportunities in all sectors of the economy from 16,000 in 2020 to 200,000 by 2025	
	Enhancing youth participation in decision-making processes at national, regional, and local levels	
	Establishment of world-class sporting facilities	
	Developing an integrated sport management system	
	Participating and bid to host regional, continental and international sport events	
	Establishing a sustainable funding model for sport and recreation	
	Developing an incentive scheme to stimulate investment in sport and recreation	
	Establishment of the Sport and Recreation Fund	

Cluster	NDS1 Priorities	Score
Climate Resilience, Food Systems, and Natural Resource Management	Increase food self-sufficiency from the current level of 45% to 100% and reduce food insecurity from the high of 59% recorded in 2020	54%
	Increase maize production from 907,629 tonnes in 2020 to 3 million tonnes by 2025	
	Increase beef production from 49,115 tonnes in 2020 to 110,000 tonnes by 2025	
	Promote traditional grains in low potential areas which are climate smart	
	Diversify food production and consumption moving away from maize to other food crops such as potatoes and cassava	
	Upgrading waste management infrastructure	
	Enforcing laws for the rehabilitation of mined areas	
	Capacitating local authorities to manage the environment	
	Strengthening monitoring and environmental assessments;	
	Promoting recycling initiatives	
	Reviewing the policy and legal framework for sustainable management of sensitive ecosystems	
	Reviewing and implementing forestry policies and legislation	
	Managing woodlots and tree planting	
	Increasing area under forest and tree planting by commercial plantations	
	Addressing illegal land use change	
	Implementing environmental valuations and satellite accounting	
	Promoting the establishment and development of commercial plantations	
	Promoting weather-based agriculture, including the localisation of seasonal weather forecast and weather-based index insurance mechanisms for smallholder farmers	
	Establishing an agricultural revolving fund with appropriately structured lines of credit	
	Prioritising the mainstreaming of climate change and related financing in all national programmes	
	Strengthening early warning systems	
	Promoting climate smart innovations and technology transfer	
	Implementing disaster risk management	
	Promoting the reduction of greenhouse gases and alternative energy solutions.	

Authors: Matron Muchena, Rebekah Cross and Eddah Jowah
Editor: Emeldah Takaona
Design and Layout: Rebekah Cross
Publisher: SIVIO Institute

Date Published: July 2026
DOI: 10.59186/SI.9QZJ28SE

About SIVIO Institute

SIVIO Institute is an independent organisation focused on ensuring that citizens are at the centre of processes of socio-economic and policy change. It aims to contribute towards Africa's inclusive socio-economic transformation. It is borne out of a desire to enhance agency as a stimulus/catalyst for inclusive political and socio-economic transformation. The Institute's work entails multi-disciplinary, cutting edge policy research, nurturing citizens' agency to be part of the change that they want to see and working with communities to mobilise their assets to resolve some of their immediate problems.

The Institute has three centres/programs of work focused on: (i) civic engagement, (ii) philanthropy and communities and (iii) economic development and livelihoods. In the process, the Institute addresses the following problems:

- Inadequate performance of the existing political and economic system
- Increasing poverty and inequality
- Limited coherence of policies across sectors
- Ineffectual participation in public processes by non-state actors
- Increased dependence on external resources and limited leveraging of local resources