Zimbabwe Council of Churches

Review of the National Development Strategy 1 (2021-2025) & Recommendations for the National Development Strategy 2 (2026-2030)

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EXECUTIVE SUMMARY

A. Review of National Development Strategy 1 (NDS1) (2021–2025)

The pursuit of national development in Zimbabwe cannot be separated from the deeper question of human dignity and purpose. In John 10:10, Jesus declares, "I have come that they may have life, and have it in abundance." This vision of abundant life provides a theological foundation for evaluating and shaping national development strategies. It calls for an economy and society that go beyond survival to ensure wholeness, justice, peace, and prosperity for all citizens. Abundant life speaks to material well-being food, shelter, health, and livelihoods but also extends to social harmony, equitable governance, environmental stewardship, and spiritual fulfilment.

Against this backdrop, the review done by the Zimbabwe Council of Churches (ZCC) of NDS1 reflects both progress and persistent gaps in Zimbabwe's journey toward a just and inclusive society. While the strategy achieved notable gains in infrastructure, housing delivery, and certain growth targets, the volatility of the economy, structural inequalities, corruption, and weak resilience frameworks constrained the realization of a truly abundant life for all Zimbabweans. Development without justice, sustainability, and people-centred governance falls short of the holistic vision of life in fullness envisioned in John 10:10.

Under the National Development Strategy 1 (NDS1), Zimbabwe recorded an average GDP growth of 5.5%, slightly exceeding the 5% target. However, growth was highly volatile due to external shocks, especially climate-induced droughts like the El Niño event in 2024, which slashed growth to 2%. A rebound to 6% is projected for 2025, driven by favourable rainfall. Yet, the economy remains vulnerable due to a narrow base, overdependence on agriculture, and weak resilience frameworks.

Sectoral Shifts and Performance: The manufacturing became the top GDP contributor post-2025 rebasing, though this reflected contractions elsewhere, not strong growth. Mining outperformed due to global commodity booms, while agriculture collapsed in 2024 and Tourism showed slow post-COVID recovery, contributing less than 2% of GDP.

Macroeconomic Stability: The NDS1's goal of stability was hampered by severe currency volatility, inflation, and poor confidence. The ZWL Era (2021–2024) saw hyperinflation, speculative lending, and parallel market dominance. The ZiG currency (from April 2024) brought some monetary discipline but struggled with adoption; USD use remains dominant. Inflation exceeded 10% throughout NDS1, and foreign reserves remained well below targets, covering only one month of imports by mid-2025.

Public Finance and Debt: The Zimbabwe's public debt ballooned to US$21 billion (almost 100% of GDP), with high arrears and delays in restructuring. Fiscal deficits spiked in 2023, and informal sector dominance (64% of GDP) constrained tax revenue. Formal employment declined to 14.6%, and FDI remained low, with capital concentrated in extractive industries.

Value Chain and Industrial Transformation: Progress on structural transformation under Pillar 3 was limited and uneven. The manufacturing struggled with low-capacity utilization (~51%) and declining exports (<7% of total). Soya, fertilizer, and leather value chains faced inefficiencies, underinvestment, and high import dependence. While late-stage progress in mineral beneficiation (e.g., lithium and PGMs) offers hope for NDS2, pending improved governance and sustainability.

Transport, Infrastructure, and Utilities: Zimbabwe recorded notable infrastructure achievements under NDS1, particularly in road rehabilitation and energy generation. Projects that include Robert Mugabe International Airport expansion, ERRP road upgrades, and the commissioning of Hwange Units 7 & 8 (600 MW) demonstrated state commitment to modernisation. However, progress was uneven and underfunded, with rural roads, rail, and electricity transmission remaining underdeveloped. Structural inefficiencies, poor maintenance, and limited private sector participation undermined long-term impact.

Housing Delivery: Zimbabwe exceeded its NDS1 housing delivery targets, completing over 700,000 units by end-2024—over 218% of the original goal. Headline success masked structural flaws: inadequate supporting infrastructure, poor affordability, and an expanding informal housing sector. Public dissatisfaction centred on corruption, inequity in allocation, and a disconnect between unit numbers and actual access. The lack of long-term finance, high infrastructure costs, and urban planning gaps remain major constraints.

Governance: Governance reforms under NDS1 were limited and inconsistent. Digitalisation of courts, the abolition of the death penalty, and the formation of the Zimbabwe Independent Complaints Commission (ZICC) marked progress, but deep-rooted corruption, shrinking civic space, and institutional weakness eroded public trust. Zimbabwe's Corruption Perception Index and Global Peace Index rankings remained poor, while privatisation and SOE reforms lacked transparency. Service delivery, judicial impartiality, and anti-corruption efforts failed to meet public expectations.

National Unity, Peace, and Reconciliation: Under NDS1, efforts toward national unity and reconciliation saw limited success. The National Peace and Reconciliation Commission (NPRC) facilitated dialogue and established Provincial Peace Committees, but its lack of independence, political bias, and failure to deliver truth, justice, or reparations undermined its credibility. Local reconciliation efforts led by traditional and religious leaders showed promise but were fragmented and unsupported at the national level.

Image Building, International Engagement and Re-engagement: Zimbabwe made efforts under NDS1 to re-engage with international partners and improve its global image, notably by resuming token debt payments to creditors. With public debt at USD 21 billion and key sanctions like ZIDERA still in place, the country fell short of its target to secure full sanctions removal by 2021. Despite some progress, international perception remains weak, hindered by political violence, institutional politicization, and ineffective government communication. Global indices rank Zimbabwe low on governance and influence. Without transparent governance, national cohesion, and credible reforms, efforts to restore Zimbabwe's international standing will continue to face major challenges.

Environmental Protection, Climate Resilience and Natural Resource Management: Various environmental and climate resilience initiatives were implemented, including climate-smart agriculture (Pfumvudza/Intwasa), dam construction, and early warning systems. The National Climate Change Adaptation Plan (2024–2030) aligned with global commitments was launched to guide long-term climate strategies. Notable investments in meteorological infrastructure and hosting key international environmental events. Access to climate-resilient solutions remains uneven, and environmental degradation persists. Communities raised concerns about poor enforcement, encroaching mining, deforestation, and exclusion from decision-making. Enforcement by the Environmental Management Agency (EMA) is hindered by political interference.

Human Capital Development: Zimbabwe has improved primary education access and gender parity, with near-universal attendance for children aged 6–12, but secondary enrolment drops to 54%. Academic performance is mixed, with strong Advanced Level results but weak foundational outcomes. Literacy rates are high, yet critical skills gaps persist, especially in STEM, due to outdated curricula, limited training, brain drain, and uneven rural access. Despite challenges, growth in innovation hubs, STEM education, and intellectual property signals progress toward a knowledge-based economy, dependent on continued investment and policy support.

Devolution and Decentralisation: Devolution aims to empower local governments and improve service delivery but faces major challenges. Legal gaps, limited financial transfers (only 11.88% of budget allocated), political interference, weak local capacity, and low public engagement undermine its effectiveness. Central government control remains strong, limiting local autonomy. Successful devolution requires stronger political will, comprehensive legal frameworks, better funding, capacity building, and enhanced citizen participation to realize its transformative potential.

B. Recommendations for NDS2 (2026–2030)

Zimbabwe's transition from NDS1 to NDS2 demands bold action to tackle persistent economic challenges and fast-track Vision 2030—a diversified, industrialized, and inclusive upper-middle-income economy. While NDS1 made gains in infrastructure and recovery, macroeconomic instability, skills mismatches, and overreliance on extractive industries remain. The following are recommended as key and strategic priorities.

Shared National Vision: Strengthen nation building interventions by institutionalizing National Dialogue the crafting of a shared National Vision for Zimbabwe whose development is guided by an inclusive, comprehensive and broad-based national consultative process that captures and amplifies the voices of the marginalized and the ordinary people.

Macroeconomic Stability: Focus on a credible single-currency regime, disciplined monetary policy to reduce inflation, strong debt management, expanded financial markets, and flexible, transparent forex markets.

Inclusive Growth & Structural Transformation: Caution and wide consultations needed on de-dollarization, prioritize power sector expansion, cut business costs, conclude and implement the formalisation strategy and formalize the economy, revitalize rail infrastructure, create industrial zones to boost value addition, attract quality FDI, and promote rural industrialization.

Infrastructure & Housing: Enhance competitiveness through reliable power (renewables, IPPs), quality roads, rail concessions for freight, upgraded airports, improved water and sanitation utilities, and affordable, eco-friendly housing solutions emphasizing tenure security and innovative financing.

Food Security & Climate Resilience: Ensure timely farming inputs, nutrition promotion, market access with price support, climate-smart agriculture, irrigation and water harvesting, drought-resistant seeds, and stronger environmental protection with adequate funding.

Technology, Innovation & Human Capital: Promote tech transfer and modern equipment import incentives; deepen university-industry R&D ties; support innovation hubs; enhance skills development via aligned education, updated curricula, entrepreneurship, rural access, and scholarships based on a national skills audit.

Job Creation & Youth Development: Make employment a macroeconomic priority with sector-specific data; tailor vocational training to local industries; strengthen linkages between training and jobs; boost creative industries by helping artists monetize via digital platforms.

Social Development & Protection: Prioritize health facility upgrades, recruit staff, improve worker welfare, scale water projects, tackle non-communicable diseases, and urgently implement national health insurance for vulnerable populations. Streamline social protection programs like BEAM for efficiency and accountability.

Devolution & Regional Development: Finalize legal frameworks (Metropolitans and Provincial Councils Act) to empower local authorities with clear fiscal transfers and capacity building. Enhance citizen participation, overcome political resistance, and institutionalize accountability for effective decentralization.

Image Building & Diplomacy: Improve domestic governance and human rights to strengthen Zimbabwe's international reputation. Empower citizens as national ambassadors, invest in media content to promote success stories, and train officials in diplomacy and communication.

Good Governance, Peace & Security: The national peace infrastructure needs to be revamped within the

lenses of human security and the National Peace and Reconciliation Commission be resuscitated as a matter of urgency so that it can carry on with its work and do better where it did not. Expedite the crafting of a social contract through the Tripartite Negotiating Forum and amend the TNF Act to make its decisions binding on cabinet. Strengthen institutions with better oversight, accountability, and e-governance reforms. Reform parastatals, revive peace commissions, invest in public safety, and intensify anti-corruption efforts through digital services and strong prosecutions. This comprehensive strategic approach seeks to consolidate past gains, fix structural challenges, and leverage Zimbabwe's demographic and technological potential to achieve sustained, inclusive development and resilience by 2030.

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1.INTRODUCTION

The Zimbabwe Council of Churches (ZCC) is a fellowship of Christian denominations committed to the holistic transformation of Zimbabwean society. Guided by its vision of "a united, peaceful, just and prosperous nation where all citizens enjoy dignity, equity and fullness of life," the ZCC believes that the Church has a vital role to play in shaping public life and development through moral guidance, advocacy, and prophetic witness. The Council's mission is "to mobilise churches and communities to work together for peace, justice and sustainable development through prophetic witness and transformative diakonia."
It is from this foundation of faith and civic responsibility that the ZCC presents its review of the National Development Strategy 1 (NDS1), Zimbabwe's economic and social development framework for the period 2021 to 2025. As the country aspires to attain upper-middle-income status by 2030, NDS1 was crafted as a transitional blueprint, aiming to stabilize the macroeconomy, reform governance systems, enhance service delivery, and promote inclusive growth. This review seeks to critically assess the progress, impact, and gaps in the implementation of NDS1—particularly its ability to deliver transformative development that aligns with the needs and aspirations of all Zimbabweans, especially the most vulnerable.

The theological framework that underpins this review is drawn from the Gospel message of "Abundant Life" as proclaimed in John 10:10, where Jesus says, "The thief comes only to steal and kill and destroy; I have come that they may have life and have it more abundantly." This vision of life in its fullness is further affirmed in 3 John 1:2, which prays, "Beloved, I pray that you may prosper in all things and be in health, just as your soul prospers." These scriptures remind us that true development must go beyond material wealth or economic growth; it must promote the spiritual, social, emotional, and physical well-being of individuals and communities. Development must enable people not only to survive, but to thrive with dignity, peace, and purpose.

Through this theological lens, the ZCC evaluates NDS1 not just by its economic indicators, but by its moral, ethical, and human impact. Has NDS1 contributed to a Zimbabwe where people can access quality health care, education, housing, justice, and fair opportunities for employment and entrepreneurship? Has it upheld human rights, promoted good governance, and fought corruption effectively? Has it fostered reconciliation, social cohesion, and public trust in national institutions? Most importantly, has it created the conditions for abundant life for all Zimbabweans—not just the few?

In conducting this review, the ZCC has drawn on a wide range of sources, including government reports, community consultations, seminars/workshops/conferences, focus group discussions, public surveys, and independent research. The findings reflect the lived experiences of ordinary citizens across the country—especially those in rural, peri-urban, and marginalized communities who often remain excluded from the mainstream development narrative.

The role of the Church, as understood by the ZCC, is not merely to critique but to encourage a just and compassionate development pathway—one that places the human person at the centre of all policies and decisions. In that regard, this review offers not only a critical assessment but also recommendations for policy reform, social dialogue, and institutional renewal that can lead Zimbabwe closer to the vision of abundant life for all.

In these times of economic struggle, governance challenges, and social fragmentation, the Church must speak with clarity, courage, and compassion. This review is part of that prophetic calling. It invites the government, civil society, the private sector, and faith communities to walk together towards a Zimbabwe where every person—regardless of status, location, or belief—has the opportunity to live a dignified and "Abundant life".

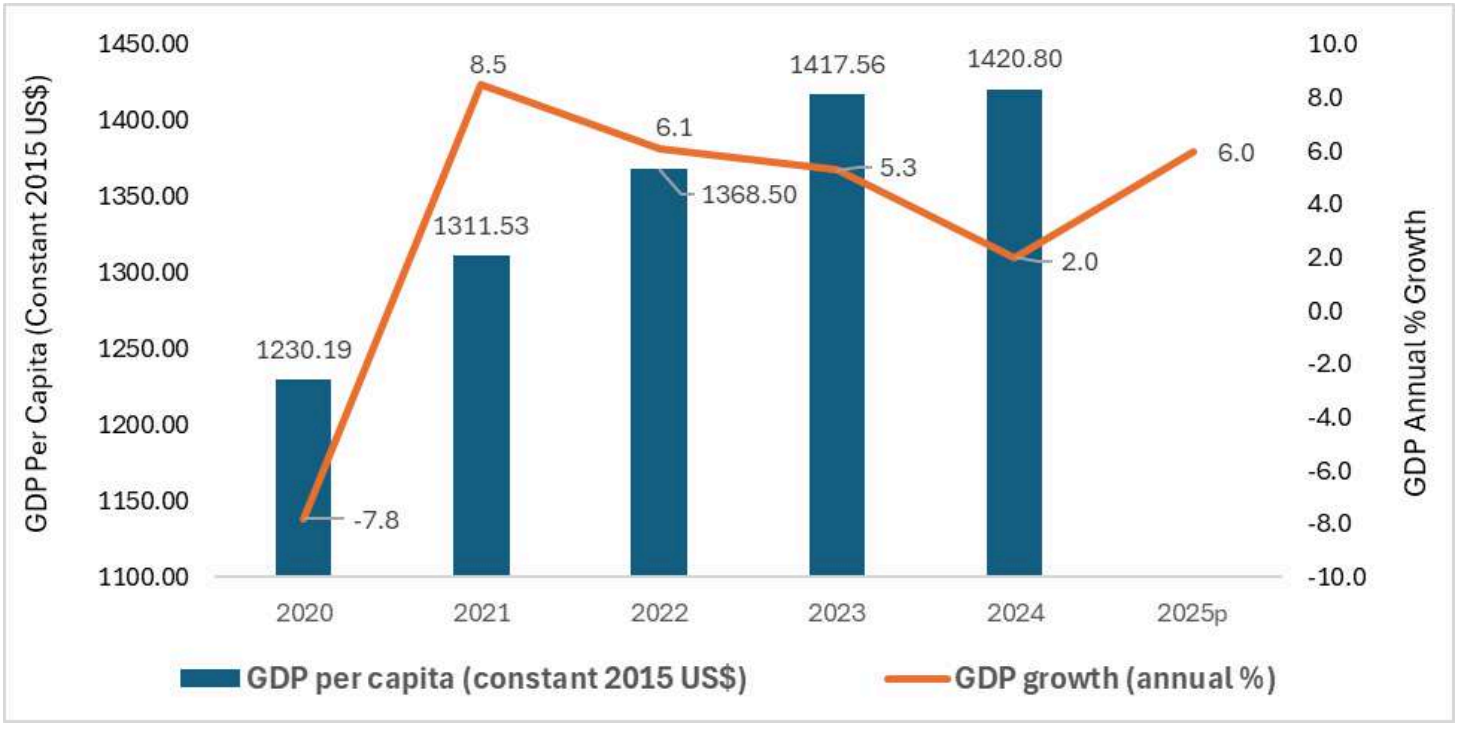
2. PILLAR 1: ECONOMIC GROWTH AND STABILITY

2.1 Economic Growth

Under NDS1, Zimbabwe averaged 5.5% GDP growth (2021–2024), somewhat meeting the 5% minimum target (Fig. 1). Growth is expected to hit 6% in 2025 as the country transitions to the National Development Strategy II (NDS2) (2026-2030). However, of concern are the swings in growth, exposing the agro-based economy's vulnerability to climate shocks. For example, the deceleration of growth from 5.3% in 2023, to 2% in 2024 was attributed to the El Niño-induced drought, which negatively impacted agriculture, energy generation, and rural livelihoods. On the other hand, the projected 6% growth for 2025 is attributed to a very successful agricultural season owing to good rains. This scenario underscores the need to build greater resilience into Zimbabwe's growth model.

The above-mentioned growth was accompanied by an 8.33% increase in per capita GDP from US$1,312 in 2021 to US$1,421 in 2024 indicating commendable progress. However, the sharp deceleration toward the end of the strategy period raises concerns about the robustness and inclusiveness of the country's growth. The NDS1 period exposed structural weaknesses, including a narrow economic base, limited job creation in productive sectors, and weak resilience mechanisms.

Figure 1: Annual GDP Growth Rate (%) & GDP Per Capita (USD) - 2020 to 2025)



Source [Statistics]: ZimStat, 2025; World Bank, 2025; p implies projected

2.2 Sectoral Performance

2.2.1 Contribution to GDP

Following the GDP rebasing in June 2025 by ZimStat, notable changes occurred in Zimbabwe's economic structure. Before the rebasing, wholesale and retail trade was the top contributor to GDP. Under the updated national accounts, this sector has dropped to third place, with its share falling from approximately 18% to just under 12%. Now leading the economy is the manufacturing sector, which averaged 16.3% of GDP between 2020 and 2023, surpassing both agriculture and mining. The mining and quarrying sector now holds second place, contributing an average of 13%, while agriculture has declined to fourth, averaging 11% during the same period (Table 1).

This shift in dominance toward manufacturing does not signal a manufacturing boom, but rather reflects the relative contraction of other sectors. A more detailed analysis is provided to evaluate the quality,and sustainability of this growth trend. Table 1 outlines the sectoral contributions from 2020 to 2023.

Table 1: Gross Domestic Product by Industry at Constant Prices (2023=100), % Contribution

Industry	2020	2021	2022	2023	*Average*
Manufacturing	17.7	16.5	15.7	15.3	*16.3*
Mining and Quarrying	12.9	12.5	13.1	13	*12.88*
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	11.9	11.9	11.7	11.8	*11.83*
Agriculture, Hunting and Fishing and forestry	10.5	11.4	11.4	11.5	*11.2*
Financial and Insurance Activities	10.8	10.3	11.2	10.9	*10.8*
Public Administration and Defence; Compulsory Social Security	4.9	4.7	4.5	4.4	*4.63*
Education	4.3	4.2	4.1	4.2	*4.2*
Accommodation and Food Service Activities	1.2	1.6	1.8	2.2	*1.7*

Source: (ZimStat, 2025)

2.2.2 Growth (NDS1 Target vs Actual)

Table 2 reveals significant and widespread deviations between NDS1 growth targets and actual outcomes across most sectors from 2020 to 2024, indicating substantial challenges in economic forecasting and plan implementation. While Mining and Quarrying emerged as a consistent outperformer, exceeding targets in four out of five years (notably 2022 and 2024), Manufacturing was a persistent area of failure, missing its target every single year, often by large margins (e.g., -18.5% actual vs -9.6% target in 2020, and only +1.6% vs +6.1% in 2024). Agriculture and Forestry showed initial strength, significantly outperforming targets from 2020 to 2023 (most dramatically in 2021: +17.5% vs +11.3%), but suffered a catastrophic collapse in 2024 (-18.1% vs +9.5%), likely due to severe external shock like drought. This extreme volatility underscores the economy's vulnerability.

Table 2: Sectoral Growth Rates: 2020-2024 (NDS1 Target vs Actual)

Sector		2020	2021	2022	2023	2024
Agriculture and Forestry:	NDS1 Target **Actual**	-0.2 **4.1**	11.3 **17.5**	8.9 **6.2**	7.6 **6.3**	9.5 **-18.1**
Mining and Quarrying:	NDS1 Target **Actual**	-4.7 **0.2**	11.0 **5.9**	7.4 **10.5**	8.8 **5.3**	9.2 **12.9**
Manufacturing:	NDS1 Target **Actual**	-9.6 **-18.5**	6.5 **1.2**	6.5 **1.4**	7.7 **2.1**	6.1 **1.6**
Construction:	NDS1 Target **Actual**	-11.4 **4.9**	7.2 **3.5**	5.0 **0.3**	4.0 **6.8**	5.0 **3.5**
Distribution:	NDS1 Target **Actual**	-6.8 **-10.1**	5.7 **8.1**	5.5 **4.6**	5.0 **6.6**	4.5 **2.61**
Finance and Insurance:	NDS1 Target **Actual**	-6.5 **11.9**	7.2 **3.0**	3.3 **15.6**	5.2 **2.4**	6.1 **1.33**

Performance was highly volatile in key sectors, particularly sensitive to external shocks. The profound impact of the COVID-19 pandemic in 2020 is evident in widespread misses (e.g., Distribution: -10.1% vs -6.8%), though Finance (+11.9% vs -6.5%) and Construction (+4.9% vs -11.4%) defied expectations that year. Finance remained highly erratic, with massive outperformance in 2022 (+15.6% vs +3.3%) but significant underperformance in 2021, 2023, and 2024. Construction also fluctuated, only meeting/exceeding its target in 2020 and 2023. Distribution was the most stable, staying relatively close to targets. This volatility, coupled with the chronic underperformance of Manufacturing – a cornerstone of the intended "private sector-led" recovery – raises serious questions about the effectiveness of the enabling environment for this critical sector and the stability of the chosen growth path, especially when confronted with unpredictable global and climate-related shocks like the one that devastated Agriculture in 2024.

2.2.3 Agriculture

Under NDS1, Zimbabwe aimed to reform agricultural financing by restructuring Agribank into the AFC Land Bank to improve access to credit and expand contract farming. While this institutional shift was approved in 2021, progress has been slow. Formal credit access remains limited, especially for smallholder farmers, and implementation gaps continue to hinder inclusive, climate-resilient agricultural growth.

2.2.4 Mining

In the mining sector, legislative reforms progressed slowly, with key legislation like the Mines and Minerals Amendment Bill still unsigned as of July 2025, and slow progress in the reviewing the amendments to the Gold Trade Act, Precious Stones Trade Act. This has weakened investor confidence and regulatory oversight in a sector contributing 75% of exports and 13% of GDP.

Lack of updated policies, especially for rare earths, limits potential. Structural issues such as high levels of informality, weak enforcement of environmental and safety regulations, and community exclusion persist, while the unchecked smuggling and externalization of mineral resources have resulted in the loss of billions in potential national revenue, undermining both fiscal performance and developmental outcomes. Despite NDS1's commitment to ensuring that mining communities benefit directly from proximate mining operations, most local communities remain marginalized, with limited access to jobs, social infrastructure, and resource-sharing mechanisms. The "Use It or Lose It" policy rhetoric, while not misplaced, may have unintended negative effects on investor perception on the enforcement of property rights.

2.2.5 Tourism

During NDS1, Zimbabwe's tourism sector faced mixed outcomes. In 2021–2022, activity was severely depressed due to COVID-19 travel restrictions, low arrivals, and weak demand across services. A modest recovery began in 2023–2024, driven by the return of meetings, incentives, conferences, and exhibitions (MICE) events and regional reopening. However, the sector's GDP contribution remained below 2% (Table 2), indicating a limited structural recovery and continued reliance on traditional tourism segments.

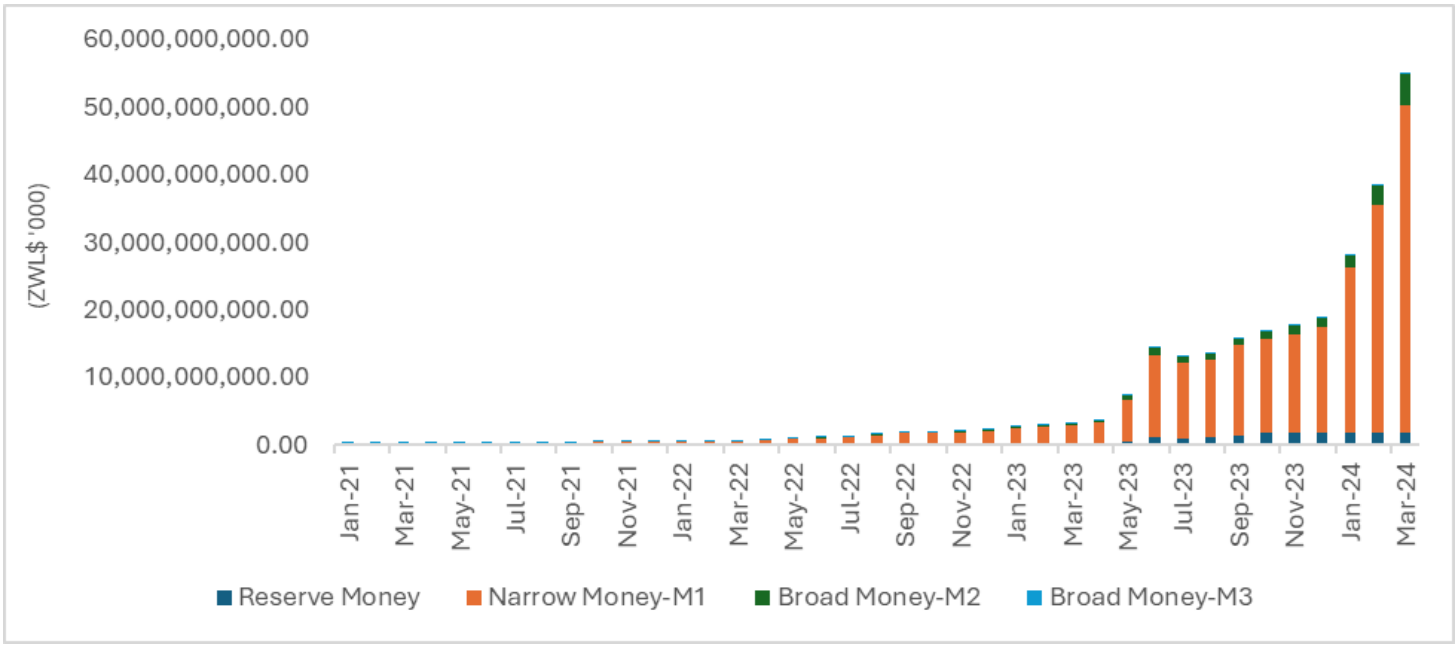
2.3 Macroeconomic Stability

NDS1 (2021–2025) prioritized macroeconomic stability, focusing on price and exchange rate stability as foundations for market-led growth. While some surface-level stability was achieved, it remained fragile, undermined by inflation, exchange rate distortions, and vulnerability to external shocks, which also weakened government service delivery.

2.3.1 Money Supply Management

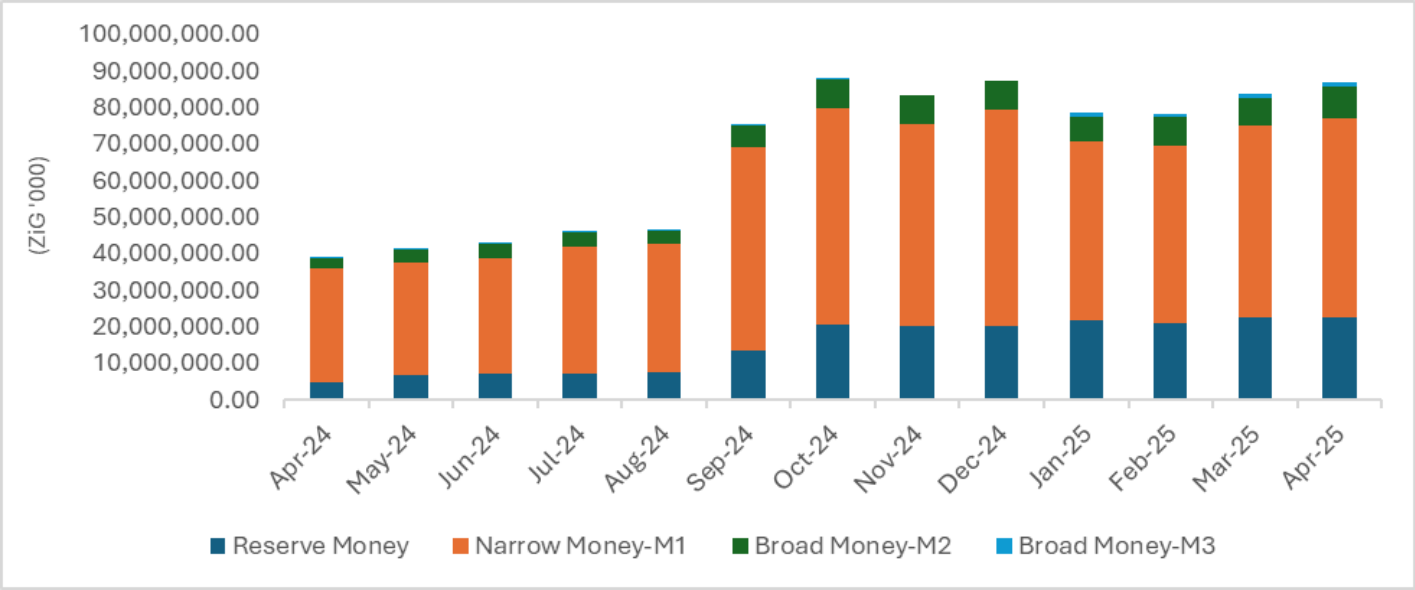
Monetary policy under NDS1 was highly unstable, divided into two phases: the ZWL Era and the later ZiG regime. During the ZWL Era, money supply grew excessively: 19% in 2021, 293% in 2022, 1,378% in 2023, and 1,752% from April 2023 to March 2024. This was driven by quasi-fiscal operations, deficit monetization, and exchange rate depreciation, which fuelled hyperinflation, currency instability, and near-total dollarization. Monetary aggregates became unreliable, and the RBZ lost control over macroeconomic stability. Fig. 2 shows monetary developments under the ZWL Era.

Figure 2: Money Supply Developments (Jan. 2021-Mar. 2024 and Apr. 2024-Apr. 2025)



The introduction of the ZiG currency in April 2024 marked a policy reset. Although reserve money grew 360% in the first year (due to a 43% devaluation in Sept 2024), growth slowed sharply: reserve money rose just 11% from Oct 2024 to April 2025, while broad money (M3) grew only 16% over the same period. The elimination of quasi-fiscal operations and Treasury's assumption of export surrender liquidation helped restore monetary discipline, signalling that the Reserve Bank of Zimbabwe (RBZ) has begun to re-establish control over monetary aggregates and has taken meaningful steps toward restoring inflation and exchange rate stability. Fig. 3 shows monetary developments under the ZIG Regime.

Figure 2: ZIG Era Money Supply Developments (Apr. 2024-Apr. 2025)



Source, Statistics: (RBZ, 2024, 2025)

2.3.2 Zimbabwe Dollar as the Dominant Legal Tender by 2025

The Zimbabwean Dollar (ZWL) was abandoned in March 2024 due to hyperinflation and replaced by the gold-backed ZIG currency in April 2024 to restore monetary stability. By mid-2025, ZIG adoption has remained slow, mainly serving as a unit of account and not widely accepted for transactions.

While the Reserve Bank of Zimbabwe has announced the launch of a de-dollarisation road map in Q4:2025, concerns over the existence of the right fundamentals abound. With the existing dominance of the USD in transactions, especially in the informal sector (85%), the reform risks failure. Indications on the ZIG becoming the sole legal tender have already negatively affected the long-term credit and mortgage markets. Sentiment is that de-dollarisation should not be forced down on the citizenry's throat, but rather, the increased usage of the ZIG should be the main indicator of market readiness for the transition. Nonetheless, there is general acceptance that the USD is only good for stabilisation but not long-term economic growth. The fundamentals just need to be right for de-dollarisation, we need not experiment with the economy.

2.3.3 Six-Month Import Cover Reserve Position

Under NDS1, Zimbabwe aimed to maintain international reserves covering six months of imports to protect currency stability. However, as of July 8, 2025, reserves stood at US$731 million (including 3.4 tonnes of gold), while May 2025 imports were US$882.1 million. This means reserves cover only about one month of imports, far below the target.

2.3.4 Inflation

Under NDS1, Zimbabwe aimed to reduce inflation to 3–7% by 2025, but inflation has remained above 10% since January 2020. During the ZWL era, hyperinflation was driven by excessive money supply growth (1,378% increase in 2023), exchange rate instability, and fiscal imbalances. Though the ZiG currency introduced in April 2024 brought some monetary discipline, inflation remained high due to past mismanagement. Frequent changes in inflation measurement methods have also undermined public trust in inflation data and policy communication. Fig. 4 depicts the ZWL and ZIG era weighted year-on-year and month-on-month inflation trends.

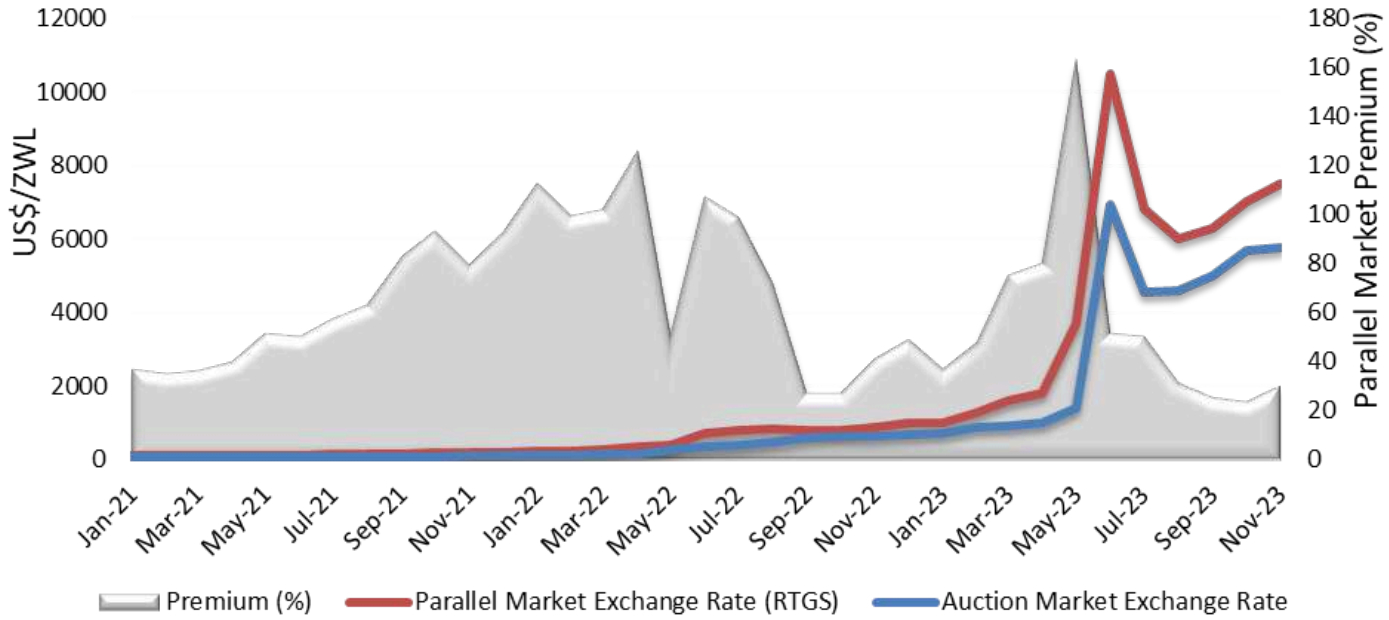
Figure 3: Weighted Year-on-Year and Month-on-Month Inflation (%)

Source, Statistics: Reserve Bank of Zimbabwe (2025)

2.3.5 Exchange Rate Stability

During most of NDS1, especially under the Zimbabwean Dollar (ZWL) regime, exchange rate stability was elusive. The Foreign Currency Auction System introduced in June 2020 initially helped but soon became distorted by limited forex supply and regulatory controls. From January 2021 to November 2023, the official exchange rate depreciated over 6,885% (from ZWL 82.68 to ZWL 5,774.28 per US$), with a large parallel market premium fuelling inflation and eroding confidence. Zimbabwe lost an estimated US$4.5 billion due to these distortions. Fig. 5 shows the exchange rate dynamics under the ZWL Era.

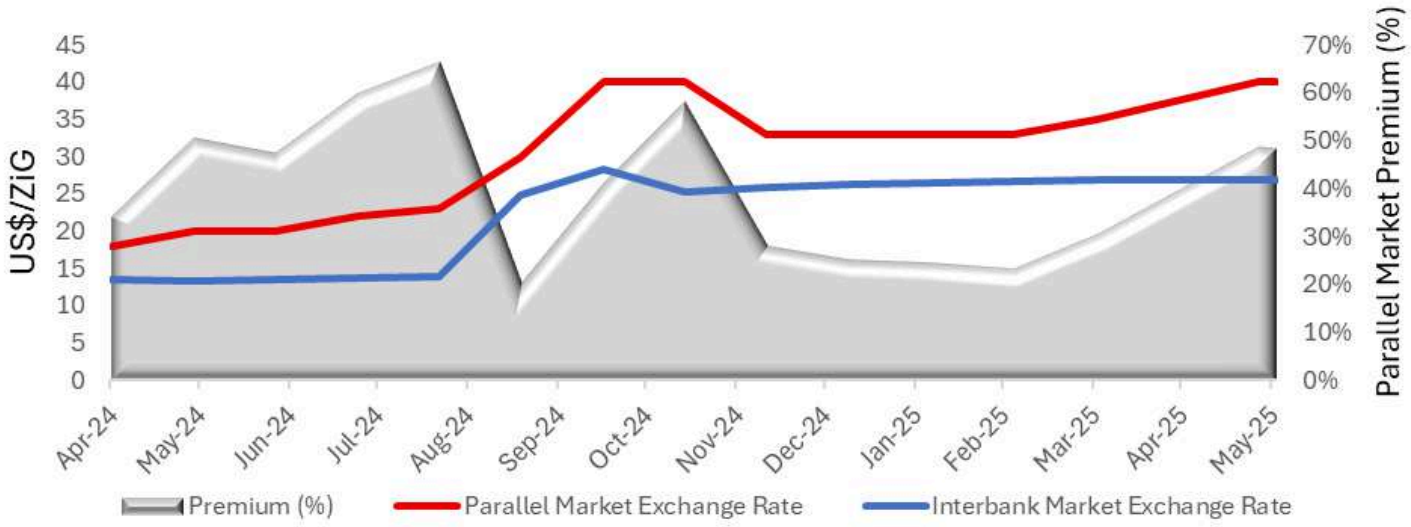
Figure 4: ZWL Era Exchange Rate Dynamics (Official vs Parallel Markets)



Source, Statistics: Reserve Bank of Zimbabwe; StreetSurveys

The Zimbabwe Gold (ZIG) currency launch in April 2024 marked a shift, but the new currency quickly lost half its value amid inflation and mistrust. A 44% devaluation in September 2024 helped stabilize the exchange rate. Since then, easing of regulatory controls and removal of fixed margins have improved exchange rate stability and market credibility compared to the chaotic ZWL period.

Figure 6: ZIG Era Exchange Rate Dynamics (Official vs Parallel Markets)



Source, Statistics: Reserve Bank of Zimbabwe; StreetSurveys

2.3.6 Financial Sector Stability

Under NDS1, Zimbabwe's financial sector faced severe structural distortions. During the ZWL era (2021–March 2024), hyperinflation pushed banks toward speculative investments in Treasury Bills and real estate. This led to high nominal profits (ROE peaked at 69%) driven by asset inflation and arbitrage, not genuine financial intermediation.

The introduction of the ZiG currency in mid-2024 prompted a reset, with total assets contracting to ZiG 161 billion by December 2024. While profitability stabilized (ROA at 24.7%), banks remain overexposed to non-core assets, and non-performing loans (NPLs) rose to 3.37%. Key risks include macroeconomic instability, operational and climate risks, and vulnerabilities to money laundering in sectors like real estate and precious metals.

For NDS2, refocusing the financial sector on productive lending is critical. This involves discouraging speculative investments, strengthening supervision, resolving NPLs, and ensuring liquidity supports private-sector growth. The ZiG offers a chance for reform, but without deliberate action, the banking system risks remaining dysfunctional despite appearing stable.

2.4 Public Finance

2.4.1 Fiscal Deficits

Under NDS1, Zimbabwe aimed to keep fiscal deficits below 3% of GDP to maintain macroeconomic stability. While this was achieved from 2019 to 2022, the deficit surged sharply in 2023 to an estimated 14% (World Bank), with government figures reporting 6.5%, revealing measurement inconsistencies. The rise was driven by high interest payments on unsustainable debt and stagnant revenues. Overall, the target was only temporarily met, with gains underpinned by inflation-driven expenditure erosion rather than genuine fiscal consolidation. Lasting fiscal stability will require better expenditure planning, improved revenue collection, and focusing budgets on human development and service delivery.

2.4.2 Public Debt

During the NDS1 period, Zimbabwe's public debt crisis worsened, with total debt reaching an estimated US$21 billion by the end of 2023 and remaining at that level by June 2024. The debt-to-GDP ratio soared to 99.6% in 2023, far exceeding the 70% legal limit set by the Public Debt Management Act, highlighting severe debt distress. External debt made up the largest portion at US$12.3 billion, fuelled by arrears, legacy liabilities, Reserve Bank obligations, and a notable US$1.9 billion fiscal transfer to the Mutapa Investment

Fund in 2023. Additionally, US$3.5 billion is owed to former commercial farm owners under the 2021 Global Compensation Deed.

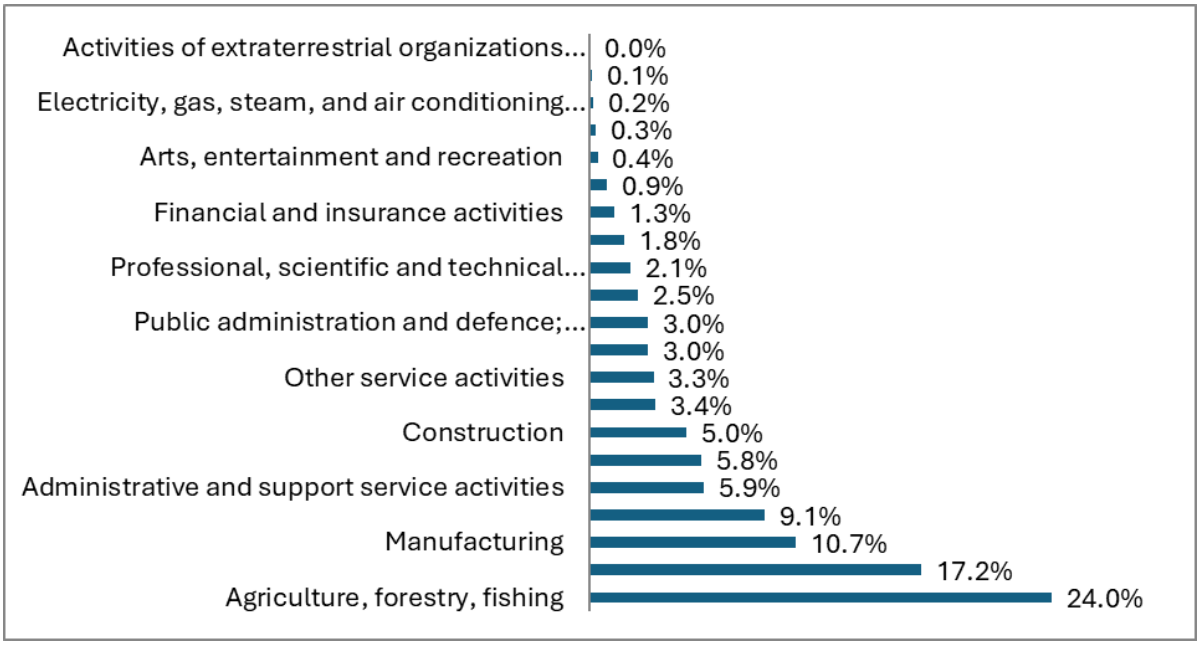
Debt servicing consumes 7% of government expenditure (as of June 2025), crowding out public services and investments. The government faces a difficult choice between accumulating more arrears or reaching a comprehensive debt restructuring, complicated by fiscal weakness and currency volatility. Unpaid contractors owe about US$200 million, further eroding economic confidence.
Despite efforts like the African Development Bank's Arrears Clearance and Debt Resolution Platform, progress remains limited. Zimbabwe is excluded from concessional multilateral financing, restricting access to affordable funds. The high debt burden continues to deter investors, destabilize the currency, and sustain fiscal fragility, with the African Development Bank labeling Zimbabwe the highest-price economy in Africa due to steep risk premiums.
2.4.3 Informal Sector

A key target NDS1 was to expand the formal economy by simplifying the regulatory framework, broadening the tax base, and creating conditions for private sector–led growth. However, efforts to formalize the economy saw limited progress. Of 204,798 private sector businesses, 76.1% operate informally, with microenterprises making up 87.9% (ZimStat, 2025). The informal sector contributes an estimated 64% of GDP, making Zimbabwe highly informal. Only about 20% of formal businesses comply with tax laws, suggesting potential tax revenue gains (up to US$6.6 billion) if formalization improved (World Bank, 2025). High compliance costs—such as needing 32 licenses for a retail store in Harare—discourage formalization, especially for microenterprises facing limited benefits. Regulatory reforms were slow, and informal businesses benefited from tax avoidance and cash transactions, placing formal firms at a disadvantage and hindering private sector growth goals.

2.4.4 Employment Creation

Zimbabwe aimed to increase formal employment from 24% (2020) to 30% by 2025, reduce precarious employment from 19% to 14%, and extend Occupational Safety and Health coverage in the informal sector from 0% to 20%. However, the labor market remains fragmented, with most workers—especially women and youth—employed informally. According to the 22022 Population and Housing Census (ZimStat, 2022), agriculture, forestry, and fishing are the main employment sources, particularly in rural areas, but these sectors are underdeveloped and low-income (Fig. 7). About 40% of non-agricultural workers are in informal jobs like vendors and household helpers, with limited access to decent work and social protection.

Figure 7: Sectoral Contribution to Employment in Zimbabwe



Source: ZimStat (2022)

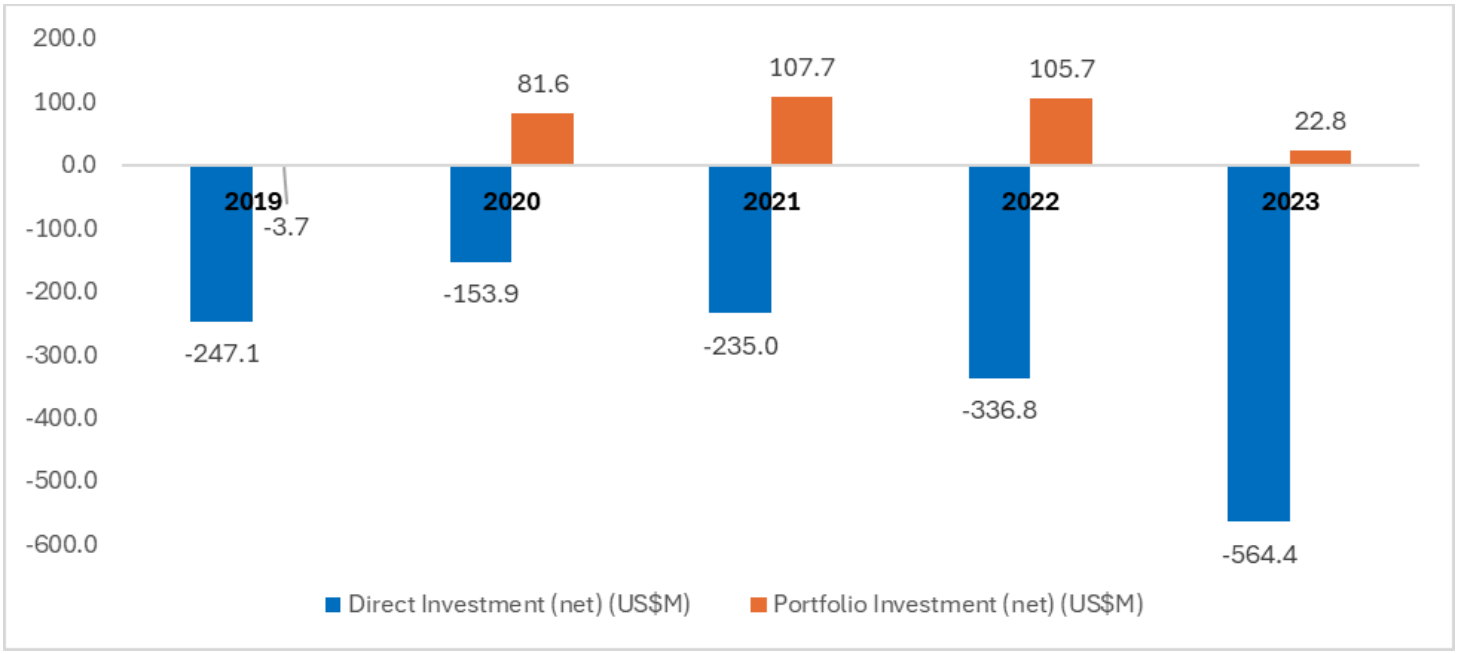
Formal employment stands at only 14.6%, forcing many youths either into informal jobs or migration abroad, causing brain drain. Technological changes and automation raise concerns about job security, while workers face wage struggles amid hyperinflation and exchange rate volatility. Jobs in ICT, digital marketing, sustainability, and analytics are growing but remain limited.

Gender disparities persist, with women mostly in low-paid, insecure informal or agricultural roles, facing societal and structural barriers to better jobs. The government is the largest formal employer, with about 400,000 civil service workers.

2.4.5 Investment Flows

Under NDS1, Zimbabwe's net foreign direct investment (FDI) remained negative, worsening from -US$247.1 million in 2019 to -US$564.4 million in 2023, reflecting capital outflows and weak investor confidence (Fig. 8). Portfolio investment was briefly positive between 2020-2022 but dropped to US$22.8 million in 2023. Most FDI was concentrated in the extractive sector—platinum, lithium, chrome, and gold—driven by global demand but with limited broader development impact. This investment skew towards the extractive sectors highlights structural imbalances, underscoring the need under NDS2 to diversify capital flows into high-impact, sectors aligned with structural transformation goals for inclusive growth.

Figure 8: Investment Flows in US$ million (2019-2023)



Source, Statistics: RBZ (2025)

Table 3 shows some mega investments under NDS1.

Table 3: Some Mega Investments into Zimbabwe under NDS1

Investment	Sector	Investor/Company & Country	Estimated Value (US$)	Key Notes
Great Dyke Investments Platinum Mine	Mining – Platinum	Russia-Zimbabwe Joint Venture	3.0 billion	One of Africa's largest platinum projects; under
Karo Resources Mhondoro-Ngezi Project	Mining – Platinum	Karo Resources (Cyprus/South Africa)	4.0 billion	Strategic platinum development in
Dinson Iron and Steel Plant in Manhize	Mining – Iron & Steel	Dinson Iron and Steel Company (China)	1.5 billion	First phase, envisioned to be one of the
Hwange Thermal Power Station Units 7 & 8	Energy – Thermal Power	Government of Zimbabwe & Sinohydro (China)	1.5 billion	600MW capacity added to the grid in 2023
Zambezi Gas & Coal Expansion	Energy – Coal Power	Zambezi Gas	2 billion	750MW targeted capacity
Zimbabwe Zhongxin Electrical Energy	Energy – Coal Power	Chinese Company (ZZEE)	-	430MW capacity in progress
Labenmon Investments	Manufacturing – Cement	China-based West International Holding	1 billion	Capacity to produce 900,000 tonnes/year in
Arcadia Lithium Mine	Mining – Lithium	Prospect Resources (Australia)/Huayou (China)	~378 million	Fully developed and exporting lithium
Invictus Energy Oil & Gas Project	Energy – Oil & Gas	Invictus Energy (Australia)	25 million (initial phase)	Muzarabani exploration—first of its kind in
Sunny Yi Feng Tile Company	Manufacturing – Tiles	China	50 million	Factory in Norton, significant job creation
Varun Beverages – Pepsi Plant	Manufacturing – Beverages	India	45 million	High-capacity soft drink production unit
Mauritian Agro-processing Investment	Agro-processing	Mauritius	20 million	Cooking oil, grain milling, and stock feeds
UAE Meikles Hotel Refurbishment	Tourism & Hospitality	Albwardy Investments (UAE)	50 million	Total revamp of one of Harare's top hotels
Coal Mine Expansions (multiple)	Mining – Coal	Local & Foreign Companies	-	Multiple new coal mines opened, supporting

Various Sources: Author's Compilation

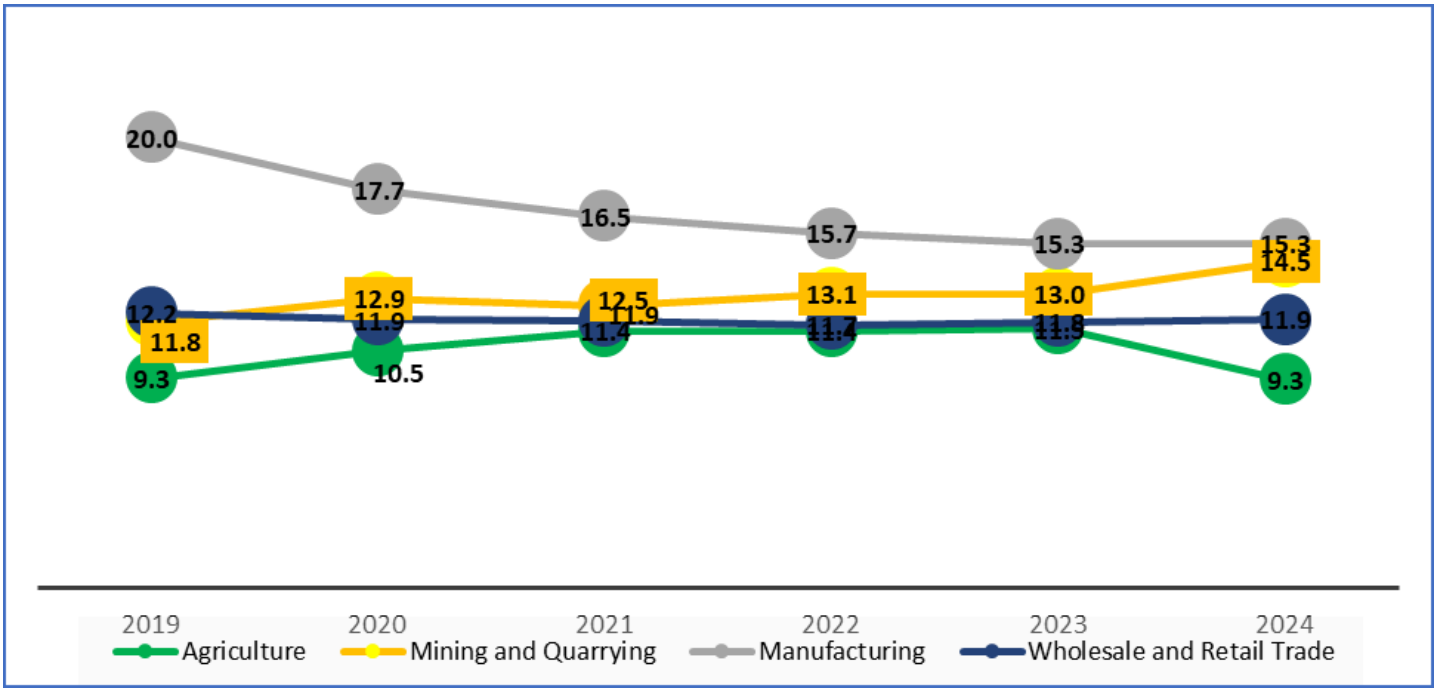
3. PILLAR 3: MOVING THE ECONOMY UP THE VALUE CHAIN AND STRUCTURAL TRANSFORMATION

NDS1 aimed to drive private sector-led growth by prioritizing twelve value chains to structurally transform the economy and create decent jobs. However, the manufacturing sector's recovery was limited, inward-focused, and has yet to become globally competitive.

2.4.5 Investment Flows

The manufacturing sector's GDP contribution declined from 20% in 2019 to 15.3% in 2024, but after the 2025 GDP rebasing, it became the largest sector by GDP share, surpassing wholesale and retail trade and exceeding NDS1 targets (Fig. 9).

Figure 5: The Contribution of the Manufacturing Sector to GDP (%) (2019 to 2024)



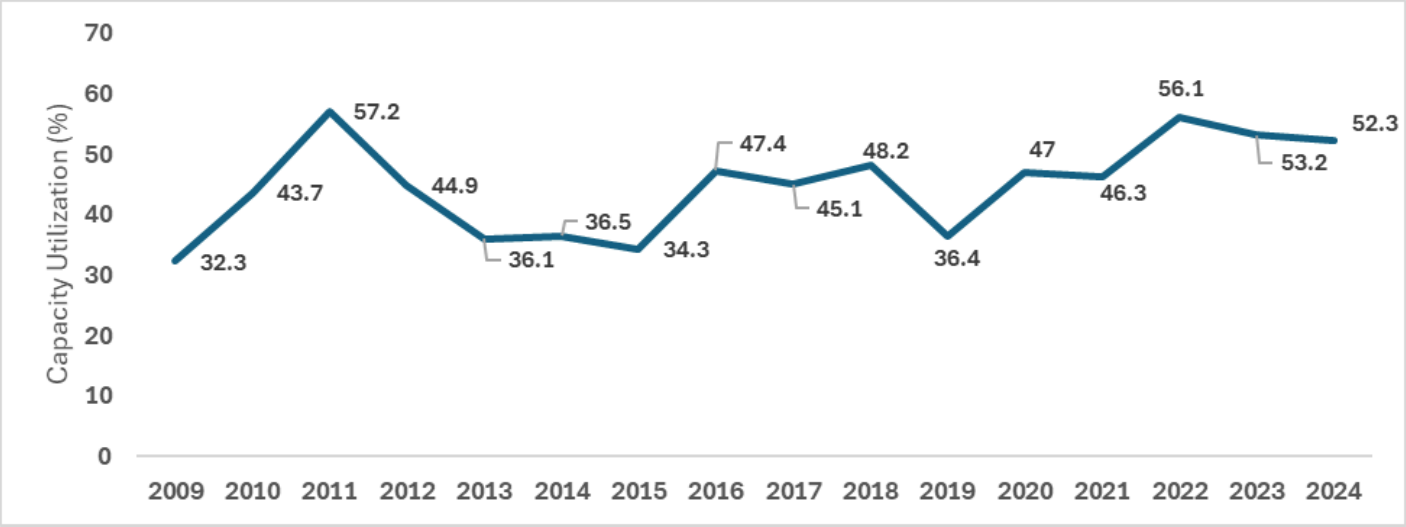
Source, Statistics: ZimStat (2025)

However, this growth was not matched by a commensurate expansion in productive capacity or export competitiveness.

3.2 Manufacturing Sector Capacity Utilization

Capacity utilization remained low, averaging about 51% between 2020 and 2024, significantly below the 70% target set in ZNIDP I (2019-2023) and NDS1 (Fig. 10). Capacity utilization was expected to reach 100% by 2025 under the NDS1. This underutilization points to enduring challenges such as outdated equipment, power supply inconsistencies, forex shortages for importing raw materials, and limited access to long-term financing.

Figure 6: Trend in Manufacturing Sector Capacity utilization (%) (2009 to 2024)



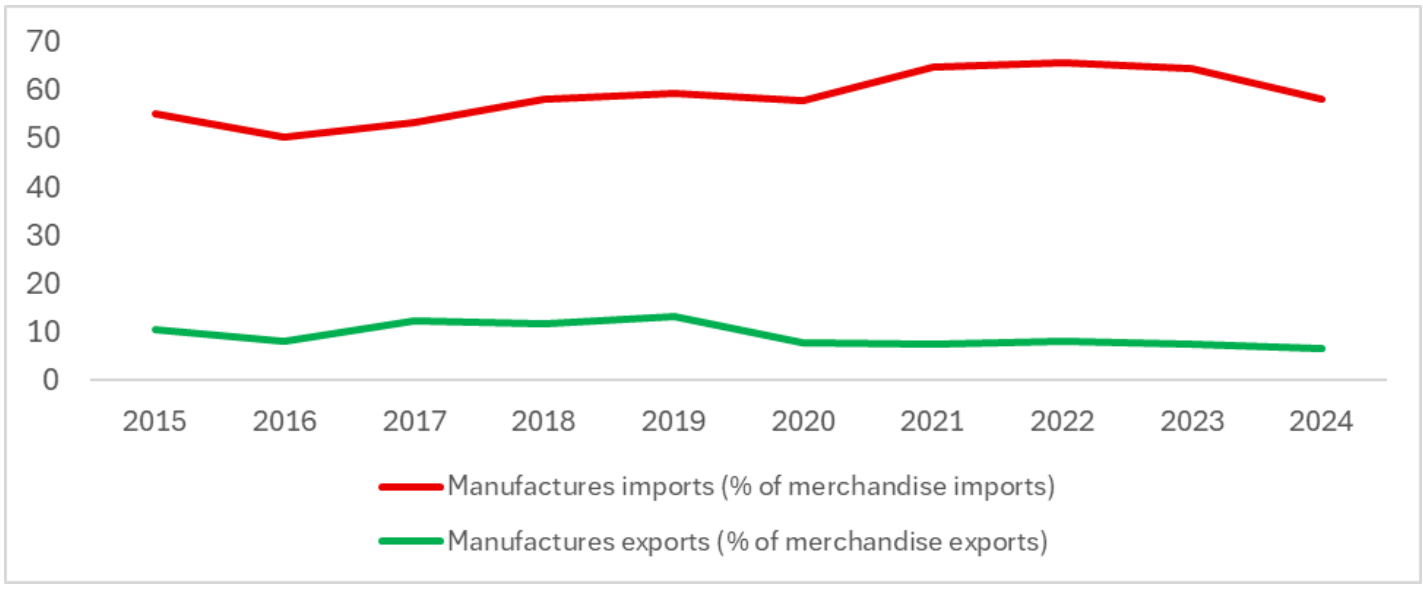
Source: (CZI, 2025)

3.3 Industrial Trade Performance

During NDS1, manufactured exports declined sharply, falling from 13% of total merchandise exports in 2019 to under 7% by 2024, down from 29% in 2000. Meanwhile, manufactured imports remained high, averaging around 60% of total imports throughout the period. Manufactured exports never exceeded 8%, well below the 16% target. On the positive side, about 49% of manufacturing plants were commissioned in the last decade (CZI, 2025), showing some modernization, and local content on shelves rose from 53% in 2018 to 80% between 2022 and 2024.

Despite this, Zimbabwe's industrialization faced ongoing challenges including heavy import dependence, weak export diversification, low competitiveness, and infrastructure bottlenecks, limiting progress toward structural transformation and value addition.

Figure 7: Manufactured Exports and Imports as a Percentage of Merchandise Exports and Imports (2000-2024)



Source, Statistics: (World Bank, 2025)

3.4 Value Chains Analysis

3.4.1 Soya Bean Value Chain

The soyabean value chain was identified as a critical component for Zimbabwe's industrialization, especially in reducing dependence on edible oil imports and supporting agro-processing and livestock feed production. Despite soyabean accounting for about 57% of the country's edible oil supply, local production consistently fell short of processor demand. This underproduction led to heavy reliance on imports, with $18.6 million spent on soyabean imports in 2022 alone. The country's oilseed crushing capacity of 610,000 metric tonnes per annum remains underutilized due to raw material shortages and inconsistent quality standards, making locally produced soyabeans less competitive.

The feed production segment also faces challenges, with rising import bills for soya meal and soya cake, as imported products are cheaper than local ones, undermining efforts to upgrade the value chain economically. For example, the import bill for soya cake alone soared by 130% between 2018 and 2022, from US$23.6 million to US$54.6 million, reflecting deepening supply gaps. Furthermore, landed prices for imported soya cake (US$550/MT) are significantly lower than local equivalents (US$650/MT), highlighting cost inefficiencies that make local value chain upgrading economically unviable.

3.4.2 Fertilizer Value Chain

Fertilizer production, a strategic driver for agricultural productivity, remained import-dependent and structurally weak during NDS1. Zimbabwe lacked access to critical inputs such as potash and modern production technologies, resulting in reliance on costly imports mainly from South Africa and Mozambique. The import bill escalated to over $388 million in 2023. Outdated production methods and poor logistics, particularly the dilapidated railway system forcing reliance on expensive road transport, increased operational costs. These inefficiencies reduced fertilizer affordability and usage, limiting agricultural productivity gains.

3.4.3 Leather Value Chain

The leather sector showed promising signs of structural transformation, with local firms producing internationally competitive finished products like shoes, belts, and wallets. Government initiatives, such as sourcing gifts from local producers during the 44th SADC Summit, boosted market visibility. However, the sector still largely depends on exporting raw crocodile skins, with minimal local processing, as international brands dominate higher-value finishing stages. Growth remains constrained by limited access to modern tanning technologies, downstream manufacturing investments, and weak integration into regional and global value chains.

3.4.4 Mineral Value Addition and Beneficiation

During most of NDS1, about 90% of minerals were exported without value addition. However, progress was made late in the period, especially in platinum group metals (PGMs) and lithium, due to government and citizen pressure to promote local beneficiation. In 2024, ZimPlats began expanding smelting capacity and refurbishing refining infrastructure, with new projects commissioned in 2025 including a smelter expansion and a solar plant. Lithium beneficiation also advanced with plans for a $400 million lithium smelter by Bikita Minerals and a $270 million lithium concentrator by state-owned Kuvimba Mining House, the latter developed with Chinese partners to position Zimbabwe in the global battery minerals market.

4. PILLAR 4: TRANSPORT, INFRASTRUCTURE AND UTILITIES

Transport infrastructure and utilities remain the backbone of Zimbabwe's economic transformation, determining the speed and cost of moving people, goods, and ideas. Under NDS1, the Government sought to modernize these vital systems by leveraging public-private partnerships to close long-standing

infrastructure gaps, improve regional connectivity, and power industrial growth. While several flagship projects demonstrated visible progress, deep-seated funding, maintenance, and capacity constraints continued to undermine the sector's full potential.

4.1 Transport Infrastructure

4.1.1 Road

Zimbabwe's road network, which carries over 70% of the country's traffic, was a key focus under NDS1, aiming to enhance mobility, reduce logistics costs, and improve regional trade competitiveness. The strategy targeted increasing the share of roads meeting SATCC standards from 5% to 10% by 2025, and expanding roads in good condition from 14,702 km to 24,500 km. Major projects included the Emergency Road Rehabilitation Programme, partial dualisation of the Beitbridge–Harare–Chirundu Highway, and the Trabablas Traffic Interchange. Significant road completions included the New Parliament Boulevard (6.5 km) and Access Road (23 km) in Harare, Hwedza–Mushandirapamwe (15 km), and upgrades in several provinces. Despite these gains, rural and feeder roads remained largely in poor condition, hampering farmers' access to markets. Maintenance backlogs and uneven progress across regions highlighted the need for sustainable funding and institutional reforms to secure long-term improvements.

4.1.2 Air Transport

The upgrade of Robert Gabriel Mugabe International Airport was a flagship achievement, featuring a new VVIP Pavilion and expanded passenger facilities to meet international standards and position Zimbabwe as a regional aviation hub. However, further investments are needed to attract new airlines, boost operational efficiency, and fully leverage tourism, trade, and diplomatic opportunities.

4.1.3 Railway

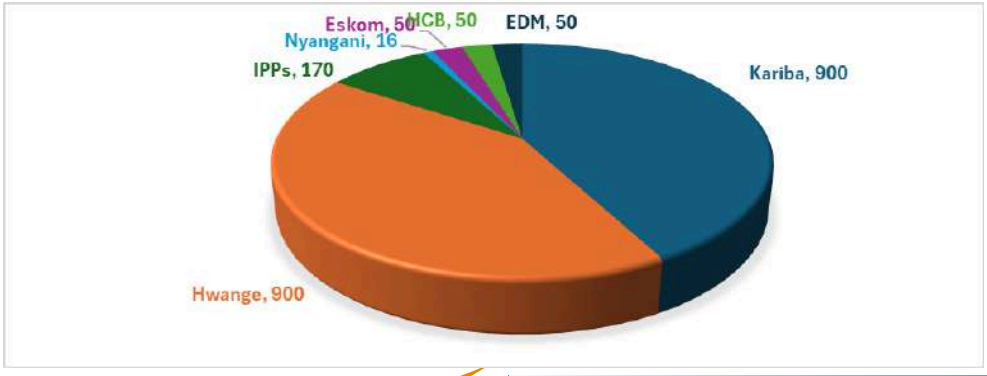
Railway infrastructure saw limited progress, with outdated rolling stock and poor infrastructure hampering efficiency and regional competitiveness. Despite emphasis on private sector involvement, most bulk freight continued to rely on the already overburdened road network, limiting the potential benefits of rail revitalization.

4.2 Utilities

4.2.1 Energy

Energy security and reliability remained critical challenges. NDS1 milestones included commissioning Hwange Thermal Power Units 7 and 8, adding 600 MW capacity. However, frequent outages, transmission losses, and foreign currency shortages persisted, limiting consistent supply. Zimbabwe's installed capacity stands at around 2,600 MW, with average generation closer to 1,200 MW due to various constraints, leading to frequent load shedding averaging 16 hours daily. The main sources of electricity are Kariba Hydro Station and Hwange Thermal Power Station, which are complemented by independent power producers (IPPs) and imports (Fig. 11).

Figure 12: Zimbabwe's Electricity Generation Capacity plus Imports (Daily Average in MW)



Source: Ministry of Energy and Power Development (2025)

5. PILLAR 6: HOUSING DELIVERY

5.1 Introduction

Housing delivery in Zimbabwe is guided by a combination of international, regional, and national policies. Globally, the UN Sustainable Development Goal 11 calls for making cities inclusive, safe, resilient, and sustainable, recognizing that about three billion people worldwide struggle to afford housing and over one billion live in informal settlements lacking basic services. Regionally, the African Union's Agenda 2063 emphasizes affordable, sustainable, and decent housing, with member states expected to integrate these goals into their national development plans.

At the national level, Zimbabwe's 2013 Constitution guarantees every citizen the right to adequate shelter, while housing delivery is a key pillar in the government's Vision 2030 to build an empowered and prosperous society. The National Development Strategy 1 (NDS1) for 2021-2025 set a target of delivering 220,000 housing units by 2025 and 470,000 in the longer term, addressing the country's significant housing backlog. To achieve this, the government prioritized partnerships with the private sector, pension funds, banks, NGOs, and other stakeholders, recognizing that government alone lacks the financial capacity to meet demand.

This collaborative approach has led to new housing developments such as Madokero Creek Phase 2 in Harare, Homelink Estate in Zvimba, and the Suncoast Housing Project in Masvingo. The government also utilized state land to support housing goals and launched the Zimbabwe National Human Settlements Policy in 2021, which replaced the 2012 policy. The new policy promotes housing densification, mandating that 40% of housing land be allocated for high-rise flats, and focuses on formalizing informal settlements. Additionally, efforts to revive the Housing Fund and the National Housing Guarantee Fund are underway to further support housing delivery across the country.

5.2 Achievements and Developments

5.2.1 Surpassing the housing delivery target

The government of Zimbabwe has significantly surpassed its housing delivery target of 220,000 units by 2025, completing 700,000 units by December 2024—218% above the original goal—with plans to raise the target to one million units. By early 2025, 70% of this revised target had already been achieved. Key projects focus on high-density, low-cost housing, supported by a ZiG2.8 billion budget in 2025. Between January and June 2025, 7,510 houses were constructed and 89,334 stands serviced across seven provinces, with Matabeleland North leading in houses built. However, public perception is largely negative, with most people citing slow service, long waiting lists, and widespread corruption favoring the wealthy or well-connected. Many also find local housing services costly and inaccessible, with the government's role diminishing as private developers take a bigger part. Table 4 and 5 show targeted housing delivery projects and constructed houses and serviced stands between January and June 2025.

Table 4: Targeted housing delivery projects in 2025

Project	2025 Allocation (ZiG)
Construction and rehabilitation of ZNA and Air Force institutional buildings	523,600,000
Upgrading of Border Posts	100,000,000
Chanceries and Embassies	392,000,000
Government Composite Buildings Rehabilitation and Construction	339,762,000
Beitbridge Border Post Modernisation Project	25,000,000
Museum of African Liberation	88,529,000
Youth & Women Training Centres	123,937,000
Immigration Offices and Housing	99,000,000
Residential Including Servicing of Stands	129,318,000
Registry Offices	227,000,000
ZRP Infrastructure	213,934,000
ZPCS Infrastructure	173,422,000
Courts Facilities	48,368,000
Social Welfare - Rehabilitation centres	62,000,000
Sports Facilities, including Stadiums	277,514,000
Total Housing	**2,823,384,000**

Source: GoZ (2025:50).

Table 5: Houses constructed and stands serviced, January 2025 – June 2025

Province	Houses Constructed	Stands Serviced
Bulawayo	159	8,613
Harare	Unavailable	Unavailable
Manicaland	Unavailable	Unavailable
Mashonaland Central	Unavailable	Unavailable
Mashonaland East	847	4,810
Mashonaland West	209	59,193
Masvingo	283	189
Matabeleland North	5,912	11,733
Matabeleland South	77	3,749
Midlands	27	1,047
Totals	**7,510**	**89,334**

Source: Unpublished data from the Ministry of National Housing

5.3 Densification and Alternative Building Technologies

The government adopted a densification strategy, requiring 40% of housing land for high-rise apartments to reduce costs and manage limited land, with projects in urban and rural areas. To speed up construction and cut costs, it is promoting alternative building technologies using local materials, despite challenges like high initial costs and limited expertise. Efforts to regularise informal settlements and revive dysfunctional ones have started in several urban areas, although illegal developments and demolitions persist.

The "smart city" concept is underway but still at an early stage, alongside rural housing revitalisation initiatives focused on sustainable, modern homes. Harare plans a 20-year halt on stand allocations to prioritize rented accommodation, potentially raising property values but risking affordability issues.

5.4 Ongoing Challenges

Major ongoing challenges include weak urban planning enforcement, infrastructure deficits, and a large housing backlog of 1.5 million units, mostly in Harare and Bulawayo. High property prices and mortgage rates, plus infrastructure costs (US$10,000–20,000 per house), make formal housing largely unaffordable. Public-private partnerships have been key but gaps between policy and practice—especially on informal settlement regularisation—and slow progress on innovations remain.

5.5 Lessons Learnt

- Delivering many units doesn't eliminate backlog amid rapid urban growth.
- Partnerships are crucial for mobilizing resources.
- Disconnects exist between official policies and local actions.
- Affordability is a major barrier.
- New housing concepts are slow to materialize.

6. PILLAR 7: GOVERNANCE

While some progress was made under the governance pillar targeting to improve public service delivery, justice service delivery and uphold national unity, peace and reconciliation, problems remain.

6.1 Public Service Delivery

Government targeted enhancing public service delivery and set out to increase the Citizen Satisfaction Index from 60% in 2020 to around 70% by 2025. Generally, available documentary evidence from the government shows that citizens are satisfied with public service delivery. For example, the Citizen Satisfaction Index for 2021, 2022 and 2023 was 68.47%, 67.78% and 70.81% against the respective targets of 50%, 55% and 65%.[1] This is despite a general lack of improvement in the public sector's services. On the contrary, independent surveys by the SIVIO Institute on the perceptions of government performance by citizens conducted between 2020 and 2024 point to a different picture. For instance, in 2024, it was found that the majority of Zimbabweans were struggling to eke out a living with inadequate access to healthcare and education, among other basic services the government was failing to adequately provide to its citizens.[2] This bleak picture was consistent with previous surveys, which found that the gap between the government's priorities and citizens' expectations was growing, with nearly 60% expressing increasing dissatisfaction with government performance, especially in healthcare delivery, infrastructure development, education and nation building.[3]

Similarly, FGDs in Bubi district revealed that corruption in public service delivery is worsening, with bribery being common for one to access services. At the same time, public sector reforms have not yielded significant improvements, and service costs remain high despite poor delivery. Similarly, participants' rating of the government's responsiveness to citizen feedback and complaints about public services since 2021, saw 45% registering that they were dissatisfied and only 4% said they were satisfied, as shown below. Participants' negative comments ranged from "The government institutions are not performing as expected" to "The government does not care at all. Hospitals are in a dire state to the extent that MPs have become whistleblowers, not oversight providers anymore."

6.2 Governance, Transparency, and Accountability

Service delivery under NDS1 has largely been decreasing and compromised owing to the lack of transparency, accountability and good corporate governance. For example, the Auditor-General's reports have documented cases of some State-Owned Enterprises and Parastatals running without boards and those with boards not paying attention to matters to do with improving transparency and accountability by strengthening their internal audit units. In 2022, the Auditor-General recorded "instances of weak oversight over internal controls as evidenced by unsupported expenditure, non-alignment of accounting policies and processes with reporting framework (accounting standards), non-acquittal of travel and subsistence allowances, inadequate controls on fuel management, non-performance of bank reconciliations and non-compliance with tax laws and regulations." Even the 2024 Ibrahim Index of African Governance Index Report ranked Zimbabwe among the countries registering warning signs in their overall governance performance for the last 10 years while they had deteriorated over the last five years.Similarly, Zimbabwe's overall ranking on the 2025 Chandler Good Government Index was 117. At the same time, it was ranked 101, 104, 115, 103, 112 and 116 for the leadership and foresight, robust laws and policies, strong institutions, financial stewardship, attractive marketplace and helping people rise pillars, respectively.

Among others, the Zimbabwe National Road Administration (ZINARA), the Grain Marketing Board (GMB), Zimbabwe Anti-Corruption Commission (ZACC), Air Zimbabwe (Private) Limited, National Handling (Private) Limited and NetOne (Private) Limited were found not complying with laid down transparency and

[1] Fourth Post-Cabinet Press Briefing, 7th March 2023, p. 7; 35th Post-Cabinet Briefing, 29th October 2024, p. 5.
[2] Eddah Jowah and Rebekah Cross, "2024 Citizens' Perceptions and Expectations Survey Report", SIVIO Institute, p. 3.
[3] Daniel Mususa, "2021 Citizens' Perceptions and Expectations Survey Report", SIVIO Institute, 2022; Eddah Jowah, "Citizens' Perceptions and Expectations: 2023 Survey Findings Report", SIVIO Institute, 2023.

accountability procedures thereby compromising on service delivery. Inadequate funding, among other reasons, adversely affected service delivery, especially in the health sector. For example, Parirenyatwa Group of Hospitals not only operated without key management personnel such as the Chief executive officer, Operations director and Chief laboratory scientists. It also had only one out of four ambulances which was functional while only four of its 16 vehicles were functioning. In addition, only 27 rooms of the hospital's residential buildings were inhabitable. The hospital also had only four functional theatres but in need of repairs out of 21, two functional X-Ray machines out of eight and one non-functional CT Scan, as well as a lack of medical equipment. Almost all of these problems plus a lack of board were being experienced in other public hospitals such as Sally Mugabe Central Hospital and United Bulawayo Hospitals, pointing to the acute health service delivery challenges in the country. The challenges facing the health sector were also acknowledged in the 2023 National Budget, which noted that "high staff turnover, with an overall vacancy rate of 13% and more pronounced among the specialist doctors' categories" was compromising the health service provision in the public sector.

The foregoing is consistent with findings from FGDs in Bikita, Buhera and Shurugwi, which indicate that while privatisation was a stated NDS1 goal to improve operational efficiency and service delivery, progress has been slow and inconsistent. This is because most underperforming parastatals (e.g., ZESA, NRZ, GMB) remain state-controlled with minimal operational improvements. In Buhera, participants noted that the privatization of non-performing parastatals was largely benefitting a few connected individuals rather than improving service delivery or efficiency. As a result, there were very skeptical about the agenda of privatization, which is poorly communicated and lacks transparency.

6.3 Combatting Corruption

Corruption remained deeply entrenched in Zimbabwe under NDS1. This is regardless of government efforts to combat the vice through capacitating the Zimbabwe Anti-Corruption Commission (ZACC) by, among others, developing a Whistleblower Protection Bill; a Witness Protection Bill; an Anti-Corruption Amendment Bill; and an Assets and Conflict of Interest Bill. Zimbabwe's Corruption Perception Index scores have consistently been below 25/100 from 2020 to 2024, indicating serious issues (Table 6). This means that government's poor ranking in service delivery is mainly the outcome of corruption. This is supported by most of the SIVIO Institute's survey reports, which found that corruption was perceived by many citizens as the main factor, apart from ineffectual leadership and incompetence and other factors, behind the government's failure to deliver public services.[4] FGDs reported widespread bribery in sectors like education and transport. Public perception is overwhelmingly negative, with most participants believing anti-corruption bodies like ZACC are ineffective. The Gold Mafia documentary further fuelled scepticism about the government's seriousness in tackling high-level corruption.

Year	Baseline 2020	2021	2022	2023	2024
Rank	157/180	157/180	157/180	149/180	158/180
Score	24/100	23/100	23/100	24/100	21/100

6.4 Ease of Doing Business

Although the country established a Commercial Court as a division of the High Court in support of the ease of doing business, Zimbabwe has (not or slightly) improved its ranking on the ease of doing business. This

[4] Mususa, "2021 Citizens' Perceptions and Expectations Survey Report"; Jowah, "Citizens' Perceptions and Expectations: 2023 Survey Findings Report"; Jowah and Cross, "2024 Citizens' Perceptions and Expectations Survey Report".

is because investor confidence is difficult to realise in an environment still clouded by weak institutions that lack transparency and accountability. While the government's launch of a licensing portal (Do-It-Yourself Portal) in September 2024 resulted in a 9% increase in the number of licences issued by the Zimbabwe Investment Development Agency (ZIDA) in the third quarter of 2024 in comparison to the second quarter of the same year, challenges still remain. For example, the Minister of Finance, Economic Development and Investment Promotion admitted that investment facilitation and the investment environment were still being compromised by an array of registration processes, fees and charges, as well as the numerous government agencies at the country's border posts.[5] No meaningful review of the challenges affecting the cost of doing business in the country had been undertaken by July 2025.[6]
It seems the overall business environment in Zimbabwe has generally not improved. For example, in 2023, Zimbabwe was performing poorly in terms of Natural Resource Governance Index, which consists of value realization, revenue management and enabling environment, compared to other countries in Southern Africa. This generally made the country less competitive compared to its regional counterparts.[7] This suggests that Zimbabwe's aspiration to improve both the Global Competitiveness and Ease of Doing Business rankings to below 100 by 2025 is far from being realised.

6.5 Justice Delivery

Justice sector reforms, particularly the rollout of the Integrated Electronic Case Management System (IECMS), have improved court efficiency and access in some regions. This has facilitated "digital access to judgements, online case tracking, virtual court hearings, e-filing of cases and e-payment of fees among other features." For example, in 2023, "the Superior Courts cleared about ninety-five (95%) of the thirty-one thousand five hundred and sixty (31 560) cases that were in the respective courts' registries." In 2024, the Superior Courts had a clearance rate of 96% when they completed 36660 cases and left a backlog of 1465 cases.

More so, about eight new magistrates' courts were being built in 2024 in line with the Judicial Service Commission's decentralisation programme and the decentralised Legal Aid Directorate (LAD) offices expanded physical access to justice. For their part, in 2023, the Magistrates' Regional Courts had a clearance rate of around 82%. They cleared 10953 cases and left a backlog of 1996 cases.[8] In 2024, the Magistrates' Regional Courts had an 82% clearance rate. They had an annual workload of 8871 cases and completed 7284 cases and left a backlog of 1587 cases.[9] Indeed, the foregoing progress has been acknowledged by some participants, with one noting that "Some improvements have been noted with the coming of the digitalisation process" and another said "Courts are available at district level."

To enhance the physical access of the persons with disability to justice, all the new courts under construction include access ramps and other facilities, which were or are still non-existent in many buildings of established courts.This is important because Zimbabwe has 1.3 million (9.2%) of its population with disability.

6.6 Challenges in Justice Delivery

Regardless of the above positive developments, justice delivery continued to face challenges under the NDS1. Among others, access to justice continued to be hampered by the courts' loss of a high number of experienced personnel for many reasons, but dominated by staff resignations, mainly caused by unattractive remuneration. For example, staff resignations from the courts stood at 164 in 2022, 150 in 2023 and 167 in 2024, with the magistracy and secretary ranks being the most affected.[10] In addition, regardless of its potential to transform and improve justice delivery, the IECMS's utility faces several challenges, including "resistance to change, technological resource constraints, the lack of public awareness,

[5] The 2025 National Budget "Building Resilience for Sustained Economic Transformation", Presented to Parliament of Zimbabwe, Harare, by Hon. Prof Mthuli Ncube on 28 November 2024, p. 183.
[6] 2025 Mid-Term Budget and Economic Review. "Building Resilience for Sustained Economic Transformation", Presented to the Parliament of Zimbabwe, by the Hon Prof Mthuli Ncube on 31 July 2025, p. 186.
[7] National Competitiveness Commission, 2023 National Competitiveness Report, pp. 96-99.
[8] Judicial Service Commission, 2023 Annual Report, 46.
[9] Judicial Service Commission, 2024 Annual Report, 33.
[10] Judicial Service Commission, 2024 Annual Report, 18.

,technological illiteracy by users and poor Internet connectivity in Zimbabwe."[11] More so, people with disabilities' access to justice continued to face many challenges. For example, the Deaf Zimbabwe Trust reported that in 2023, while 160 rape cases were reported involving women and girls with psychosocial disabilities across the country, many of them did not progress to trial or result in convictions because of their alleged lack of legal capacity, denoting the women victims' capability to take part in legal proceedings or defend their rights under Zimbabwean law.[12] As a result, this has contributed to unresolved cases.

In addition, the overcrowding of prisons and the inhuman conditions in prison holding cells have remained despite plans to improve the situation.[13] For example, the Report of the Portfolio Committee on Justice, Legal and Parliamentary Affairs on the Inquiry into the State of Affairs in Zimbabwe Prisons and Correctional Service Facilities and Living Conditions of Prisoners found that Harare Remand Prison housed 1485 inmates inclusive of 154 prohibited immigrants against its holding capacity of 900 inmates. At Bindura Prison, one prison cell housed 87 inmates against its holding capacity of 20 inmates.[14] What is more, prisons were struggling to provide inmates with three meals per day and these meals were not meeting the accepted dietary scale requirements, especially on protein components. The most affected were Chikurubi Female Prison and Harare Remand Prison, where inmates would go for over two months without cooking oil and sugar.[15]

Again, the justice system is perceived as highly corrupt and ineffective. As one participant said, "There is no fairness in our judicial system, corrupt people, murderers are roaming in our streets." Another noted that "What we have witnessed is catch and release for crimes affecting people's livelihood." Similar negative perceptions of the judiciary were shared by some participants, with one saying: "Everything is determined by your ability to pay" and another noting that "Party and Government institutions are conflated - courts are staffed with party activists." As a result, the citizens and businesses' lack confidence in the fairness and impartiality of the courts and legal processes, leading to a lack of access to justice. These negative views are consistent with the findings shown above, where 38%, 33% and 17% of participants rated access to justice in the country as poor, average and very poor, respectively.

6.7 Judicial Independence and Public Confidence

The judiciary is widely viewed as corrupt and politically biased. FGDs revealed deep mistrust in judicial impartiality, especially due to presidential influence over judicial appointments. Citizens reported "catch and release" practices for politically connected criminals. The country failed to meet its target of improving the country's Rule of Law Index ranking from 116 in 2019 to 100 in 2025. Instead, it worsened. For example, it ranked 124 in 2021 and 123 in 2022 and 2023 (World Justice Project, 2024). This was against the target of ranking 114, 112 and 106 during the mentioned years, respectively. Zimbabwe failed to meet its Rule of Law Index targets, ranking 123 in 2023. Lack of confidence in judicial independence remains a key barrier to justice, with many citizens believing that outcomes depend on wealth or political connections.

6.8 Human Rights and Freedoms

Among other developments during NDS1, the government established the Zimbabwe Independent Complaints Commission (ZICC) in late 2024 to ensure that citizens' complaints against the security services (the police, army and other security agents) are investigated independently and expeditiously. However, the ZICC's capacity to deliver is already questionable. This is because some of its

[11] Leon Poshai and Shikha Vyas-Doorgapersad, "Digital justice delivery in Zimbabwe: Integrated electronic case management system adoption", South African Journal of Information Management 25, no. 1 (2023), p. a1695. https://doi.org/10.4102/sajim.v25i1.1695

[12] Deaf Zimbabwe Trust, Access to Justice for Women and Girls with Intellectual Disabilities who are Survivors of SGBV. Position Paper.

[13] Remember Deketeke, "Zimbabwe steps up efforts to modernize prisons", The Herald, 23 April 2025, https://www.heraldonline.co.zw/zimbabwe-steps-up-efforts-to-modernise-prisons/

[14] The Report of the Portfolio Committee on Justice, Legal and Parliamentary Affairs on the Inquiry into the State of Affairs in Zimbabwe Prisons and Correctional Service Facilities and Living Conditions of Prisoners, Presented to Parliament in December 2022, p. 10.

[15] Ibid., pp. 8-9.

commissioners are known to have strong links to the ruling party, ZANU-PF.[16] This erodes public trust in a desperately needed institution considering the history of the security sector's complicit in human rights violations. On the other hand, the government was able to pass the Death Penalty Abolition Act, officially abolishing the death penalty in December 2024, which was commended by Experts of the Human Rights Committee. Still, the committee raised questions on land reform and the independence of the judiciary, which it said allowed high-level officials to bypass the one-farm-per-official policy because of the land redistribution's lack of mechanisms to ensure transparency and impartiality.[17] While the alignment of the outstanding pieces of legislation to conform to the 2013 Constitutional provisions has seen a lot of progress, concerns have been raised because some of the Constitutional amendments have yielded regressive results and continued to restrict rights to freedom of expression, assembly and association, as well as civic space. Among others, these laws include the Patriot Act (the Criminal Law (Codification and Reform) Amendment Act, 2023), the Maintenance of Peace and Order Act, 2021, and the Private Voluntary Organisations Amendment Act, 2025. From this, it is apparent that citizens are still being impeded to exercise their fundamental rights and freedoms provided in the Constitution and the International Covenant on Civil and Political Rights. Indeed, under NDS1 Zimbabwe has recorded an increase in cases of enforced disappearance, torture, arbitrary deprivation of life, degrading treatment by the government, arbitrary arrest and detention and unjustified arrests and prosecution of journalists.[18] This is partly because Zimbabwe has not acceded to and ratified the Convention Against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment and the International Convention for the Protection of All Persons from Enforced Disappearance.

6.9 Public Safety and Order

Efforts to improve police professionalism have yet to translate into improved safety. Zimbabwe has continued to decline in the Global Peace Index, ranking 141 out of 163 in 2025 (Table 7). The Ibrahim Index of African Governance also reflects a decade-long deterioration in public safety and security, suggesting persistent instability and insecurity.

Table 7: Zimbabwe's ranking on the Global Peace Index from 2020 to 2025

Year	Baseline 2020	2021	2022	2023	2024	2025
Rank	125/163	121/163	154/163	151/163	149/163	141/163

Source: Synthesised from reading various Global peace index reports from 2020 to 2025.

6.10 National Unity, Peace, and Reconciliation

The outcome of improved national peace and reconciliation was expected to be realised through the work of the National Peace and Reconciliation Commission (NPRC), whose lifespan ended in 2023, leaving the work of improving social cohesion unfinished. Still, one significant peace-building initiative was the establishment of Provincial Peace Committees (PPCs) by the NPRC. These committees were created in various provinces across the nation to foster dialogue among conflicting parties, enhance social unity, and address community concerns. By uniting different stakeholders, such as traditional leaders, government representatives, and civil society members, the PPCs aimed to create a space for

[16] Edknowledge Mandikwaza, "Can Zimbabwe's Independent Complaints Commission win civil society over?" ISS Today, 10 March 2025, https://issafrica.org/iss-today/can-zimbabwe-s-independent-complaints-commission-win-civil-society-over.
[17] Experts of the Human Rights Committee Congratulate Zimbabwe on Passing a Law Abolishing the Death Penalty, Raise Questions on Land Reform and Judicial Independence, 7 March 2025, https://www.ohchr.org/en/meeting-summaries/2025/03/experts-human-rights-committee-congratulate-zimbabwe-passing-law
[18] United States Department of State, 2022 Country Reports on Human Rights Practices: Zimbabwe. https://www.state.gov/reports/2022-country-reports-on-human-rightspractices/zimbabwe/; United States Department of State, 2023 Country Reports on Human Rights Practices: Zimbabwe. https://www.state.gov/reports/2023-country-reports-on-human-rightspractices/zimbabwe.

communities to express their issues and pursue peaceful solutions.[19] In addition to the NPRC, chiefs in rural areas where most atrocities took place were leading a programme aimed at healing victims and their families. There were discussions focused on providing compensation to the families of the victims. Religious leaders were also engaged in these efforts.

Despite these initiatives, the NPRC had challenges in sustaining its importance and effectiveness. Although there was some progress in initiating dialogue and increasing awareness of past injustices, the NPRC generally did not fulfill its commitments of truth, justice, and reconciliation. It lacked independent operation and faced political pressures, which significantly weakened its credibility and efficiency. For example, in its 2023 annual report, the NPRC noted that it received 105 new complaints plus those from its 2022 backlog to make a total of 138 and only successfully investigated and concluded 104. About 47% of the complaints were related to political conflicts and Masvingo Province topped the list of the total complaints at 27% and the other nine provinces shared the remaining 73%.[20]

Similarly, an evaluation of the NPRC between 2018 and 2021 found that the NPRC exhibited a bias in its interaction with civil society, despite these groups being key players in violence prevention, conflict transformation, and the national healing process. The NPRC carefully selected which civic organisations to partner with. While the NPRC received and investigated complaints, it did not resolve most of them. In some instances, it referred most of the cases to government agencies and did not provide feedback on whether these cases were eventually resolved. The NPRC seemingly had no significant effect on initiatives aimed at national healing and reconciliation. The activities it reported were superficially implemented. For instance, the Commission's public consultations, women's safe spaces, and strategic interactions with peace and security stakeholders were either one-time events or were repeated, but failed to create a noticeable impact within the community.[21]

7. PILLAR 9: IMAGE BUILDING, INTERNATIONAL ENGAGEMENT AND RE-ENGAGEMENT

The international engagement and reengagement efforts saw the government making efforts to clear its arrears with creditors. For example, "in March 2021, [it] resumed quarterly token payments to the Multilateral Development Banks (MDBs), the World Bank Group, the African Development Bank and the European Investment Bank. During the third quarter of 2021, Government also started making quarterly token payments to each of the sixteen (16) Paris Club Creditors, as a sign of Government's strengthened commitment towards the re-engagement process."[22] The country continues to make quarterly token payments to the international financial institutions (IFIs) and the 16 Paris Club creditors, suggesting that a lot still needs to be done for Zimbabwe to clear its arrears and debt.[23] Zimbabwe's public debt had risen to approximately USD21 billion, with around USD13 billion being external debt while about USD8 billion is domestic, by November 2024.[24]
Although sanctions on the majority of the country's ruling elite and related institutions have been removed, some remain. This dovetails with the Minister of Foreign Affairs and International Trade, Prof Amon Murwira's response to a question posed regarding the status of the sanctions in the Senate on 19 June 2025. He noted that:

[19] National Peace and Reconciliation Commission Annual Report, January-December 2023, pPp. xii-xiii.
[20] National Peace and Reconciliation Commission Annual Report, January-December 2023, p. viii.
[21] Heal Zimbabwe Trust, Zimbabwe's Transitional Justice Vehicle: A White Elephant. An Evaluation of the National Peace and Reconciliation Commission 2018-2021 (Harare: Heal Zimbabwe Trust, 2022), pp.1-3.
[22] The 2022 National Budget Statement, 'Reinforcing Sustainable Economic Recovery and Resilience', Presented to the Parliament of Zimbabwe, Harare, by Hon. Prof Mthuli Ncube, on 25 November 2021, p. 121.
[23] The 2025 National Budget "Building Resilience for Sustained Economic Transformation", Presented to Parliament of Zimbabwe, Harare, by Hon. Prof Mthuli Ncube on 28 November 2024, p. 194.
[24]Time to accelerate Zimbabwe's $21 billion public debt and arrears resolution process, say stakeholders, 26 November 2024,https://www.afdb.org/en/news-and-events/press-releases/time-accelerate-zimbabwes-21-billion-public-debt-and-arrears-resolution-process-say-stakeholders-78944#:~:text=The%20IMF's%20programme%20falls%20under,billion%20public%20debt%20and%20arrears. See also, The 2025 National Budget "Building Resilience for Sustained Economic Transformation", Presented to Parliament of Zimbabwe, Harare, by Hon. Prof Mthuli Ncube on 28 November 2024, p. 69.

> We have realised that there is traction. They have since toned down but they have not removed the sanctions totally. Removing names from the list does not mean removing sanctions. Removing sanctions means repealing the law totally. Looking at other countries, especially in the West, looking at ZIDERA, it is still intact.[25]

This points to the country's failure to meet its target of achieving a 100% removal of sanctions since 2021. More so, Zimbabwe has been ranked among the world's most unhappy countries since 2021, indicating its failure to meet the NDS1 targets.[26]

While the country has heavily invested in image building, international engagement and re-engagement efforts, the outcomes have largely been mixed. The media's role in publicising and disseminating information that assists in positive image building and international engagement and re-engagement efforts did not bear fruit because the message was contrary to what was obtaining on the ground in the country. For example, the Commonwealth cited continued political violence and intimidation as a major stumbling block to Zimbabwe's re-engagement.[27] As shown below, only 5% of participants rated the government's communication in promoting a positive image as excellent, while 65% said it was average. Among the comments given related to this rating included that "It's only talk and no promised action is done" and "Image building killed by politicizing national institutions." In addition, Zimbabwe's international reputation was rated average by 47% of participants, while 32% said it was poor, as shown below. Among other explanations given for this rating included that "The U.S. has lifted some sanctions by Executive Order, but no traction/talk on ZIDERA. Mostly in good terms with the East and less so with the West, despite the friend to all and enemy to none mantra" and "Poor human rights record." This dovetails with the Chandler Government Index's ranking of Zimbabwe at number 118 for the global influence and reputation pillars.[28] The foregoing suggests that without a good national image among the citizens, it is challenging to have a good image of the country internationally.

8. PILLAR 10: ENVIRONMENTAL PROTECTION, CLIMATE RESILIENCE AND NATURAL RESOURCE MANAGEMENT

Various strategies and programmes were pursued by the government to address environment and climate change related challenges during the implementation of NDS 1. These include, among others, climate smart agriculture interventions like Pfumvudza/Intwasa, irrigation development and dam construction and ecosystem management such as the afforestation programme, as well as risk management interventions like weather early warning systems. The importance of meteorological services to both agriculture planning and aviation purposes saw the government acquiring five weather radars and the rehabilitation and upgrading of meteorological stations' infrastructure at airports in Bulawayo, Harare and Victoria Falls.[29]

[25]Parliament of Zimbabwe, Senate, 19 June 2025, https://www.parlzim.gov.zw/download/senate-hansard-19-june-2025-vol-34-no-57/

[26] Sheriff Bojang Jnr and Erin Conroy, "Mnangagwa's Zimbabwe among the world's most unhappy countries", The Africa Report, 21 March 2025, https://www.theafricareport.com/379610/africas-happiness-gap-mauritius-shines-while-sierra-leone-zimbabwe-trail-behind/#:~:text=Zimbabwe%20ranks%20143rd%20in%20the,cities%20are%20the%20most%20corrupt

[27] Has National Development Strategy 1 failed?, Zimbabwe Independent, https://www.newsday.co.zw/theindependent/letters/article/200013921/has-national-development-strategy-1-failed/.

[28] The Chandler Government Index 2025 Report, p. 25.

[29]The 2022 National Budget Statement. 'Reinforcing Sustainable Economic Recovery and Resilience', Presented to the Parliament of Zimbabwe, Harare, by Hon. Prof Mthuli Ncube on 25 November 2021, pp. 72-73.

The Government also made some progress when it developed the country's National Climate Change Adaptation Plan (NAP), 2024-2030, which paved the way for the implementation of appropriate adaptation measures to decrease the country's vulnerability to climate change, in line with the nation's Nationally Determined Contributions (NDCs). The significance of this Plan rests in that, among others, it supports sector-specific adaptation strategies, improves disaster preparedness and promotes the adoption of climate-smart practices in agriculture, water management and infrastructure development.[30] Sentiments from FGDs climate resilient agricultural practices, especially Pfumvudza/Intwasa. While some participants indicate fair access to Still, it appears access to climate-resilient agriculture practices is still very limited. This is because, as shown below, only 5% of participants strongly agreed that there was was "Poor supervision of climate proof agricultural practices", another stated that "Pfumvudza/Intwasa has taken the lime light, is a welcome development and has far-reaching consequences on the climate mitigation." There were also mixed sentiments on preparedness for climate-related disasters. Some felt that, "Civil protection unit has increased its visibility", while others were indicated that, "The communities experience the effects of drought more than before" and; "Food shortage is persisting in rural areas without helping hand from the government", respectively. Among the challenges related to climate change participants have observed in their communities since 2021 included but were not limited to: frequent droughts, floods, unpredictable rainy seasons, abnormal heat, extreme colds; unpredictable weather patterns, late rains and prolonged winter.

Zimbabwe's efforts around environmental protection included the hosting of the COP15 of the Ramsar Convention in 2025, which discussed how the world should manage wetlands to reduce climate change, improve food security and protect community livelihoods. Again, Zimbabwe hosted the SADC Trans-Frontier Conservation Summit in 2025, which went a long way in generating a supportive environment for local participation in decision making processes and for increasing investment opportunities for income generating activities for communities.[31] The government also facilitated the rehabilitation of degraded land in mining areas, restoration of wetlands, upgrading of Zimparks infrastructure and the Presidential Legacy Forests Project.[32] Though inadequate, the Environmental Management Agency's (EMA) programmes to address pollution and environmental degradation have been supported by strengthening its capacity to safeguard the environment through the provision of essential equipment and necessary infrastructure.[33] Nevertheless, FGD sentiments on whether the country's protected areas such as national parks, wildlife reserves, and wetlands have been effectively managed over the period 2021 to 2025 included: "The wildlife areas have been approved as mining places" and; "Wetlands not being adequately protected especially in urban areas." Government conservation efforts were rated 'poor', with sentiments such as: "no evidence that they are doing anything" and; "Trees are being cut without replacement, there is mining everywhere."

Progress around environmental management in Zimbabwe remains slow. A 2022 Afrobarometer survey exploring Zimbabweans' experiences and perceptions of pollution, environmental governance, and natural resource extraction found that almost half (47%) of Zimbabweans, especially in urban areas, considered pollution in the form of accumulation of trash or damage to the quality of the air, the water, or the land a "very serious" (28%) or "somewhat serious" (19%) problem in their communities. Among the most environmental issues in communities included trash and plastic disposal (mentioned by 30%), deforestation (23%), pollution of water resources (16%), and human waste management (10%). Nearly half (46%) concurred that plastic bags are a major source of pollution in Zimbabwe, and 74% said the government should be doing more to limit pollution and protect the environment, with 51% indicating that they wanted the government to do "much more."

[30] The 2025 National Budget "Building Resilience for Sustained Economic Transformation", Presented to Parliament of Zimbabwe, Harare, by Hon. Prof Mthuli Ncube on 28 November 2024, p. 124.
[31] 2025 Mid-Term Budget and Economic Review. "Building Resilience for Sustained Economic Transformation", Presented to the Parliament of Zimbabwe, by the Hon Prof Mthuli Ncube on 31 July 2025, pp. 176-177.
[32] The 2025 National Budget "Building Resilience for Sustained Economic Transformation", Presented to Parliament of Zimbabwe, Harare, by Hon. Prof Mthuli Ncube on 28 November 2024, p. 125.
[33] The 2025 National Budget "Building Resilience for Sustained Economic Transformation", Presented to Parliament of Zimbabwe, Harare, by Hon. Prof Mthuli Ncube on 28 November 2024, p. 125.

Regarding natural resource extraction, 33% of Zimbabweans said the benefits of natural resource extraction dwarf its negative impacts, such as pollution, while 43% saw the costs as being higher than the gains. As a result, 79% wanted the government to more tightly regulate natural resource extraction to decrease its negative impact on the environment. Again, 53% indicated that communities do not receive a fair share of resource extraction revenue, while 43% said that ordinary citizens do not have a voice in decisions about natural resource extraction.[34] In addition, the area burnt continued to be a challenge with the 2024 Environment Statistics Report indicating that resettlement areas A1 and A2 were the most burnt and accounted for nearly 50% followed by communal lands at 13.51%.[35] The foregoing is not only reinforced by FGDs in Bubi district, where participants considered government efforts to protect the environment to be inadequate, with EMA being accused of "lip service" and failing to enforce regulations against politically connected actors.

Participants also concurred that local communities are largely not involved in environmental decision-making and conservation efforts. As shown below, 35% of participants indicated that local communities were somewhat involved in environmental decision-making and conservation efforts while another 35% said they were very little involved. Among those who said there was very little involvement of local communities in environmental decision-making included one participant who noted that "It's dictatorial practice. Permits are issued to those who cause environmental hazard without consultations." Others individually indicated that there were "No meetings with the locals" and; "Chiefs and councillors had a little say in decision making when people from government and ruling party show interests in a certain area." Similarly, 44% and 13% of participants disagreed and strongly disagreed while 26% were neutral that stakeholders were involved in environmental decision-making, as shown below. As this was not enough, 57% of participants indicated that environmental protection was very little prioritised by the government while 17% said it was prioritised a lot.

9. PILLAR 13: HUMAN CAPITAL DEVELOPMENT

9.1 Educational Access and Gender Parity

Zimbabwe boasts impressive primary school attendance rates, with 87% of children aged 6–12 enrolled, showing gender parity between boys and girls. The gross attendance ratio (GAR) at this level is 100%, meaning every child of that age group is accounted for, though about 13% fall outside the target age bracket. At secondary level, attendance drops notably, with only 54% of children aged 13–18 enrolled. Notably, girls (55%) slightly outpace boys (52%), a reversal of traditional trends.

The Gender Parity Index (GPI) tells a compelling story. At primary level, GPI hovers around 1.00 across rural and urban areas, reflecting balanced access. However, disparities emerge at secondary school — in urban areas, boys outnumber girls (GPI=0.96), while in rural areas, more girls than boys attend secondary school (GPI=1.11). These statistics suggest improvements in gender inclusion but also hint at underlying socio-economic dynamics that affect boys more acutely in rural areas, such as early entry into labour or informal work.

9.2 Academic Performance Trends

Analysis of ZIMSEC examination results during the NDS1 period reveals a mixed picture (Table 8). While Grade 7 and Ordinary Level pass rates remain below targets, Advanced Level performance has significantly exceeded expectations, peaking at 94.6% in 2023. This rise points to stronger outcomes among a smaller, more prepared cohort of learners, though it raises questions about the quality and equity of earlier educational stages.

Table 8: Pass Rates for Grade 7, Ordinary and Advanced levels

Pass rate	Base year value		2021	2022	2023	2024	2025
Grade 7	49.90%	Target	52%	53	54	55	56%
		Actual	41.30%	40.09%	45.57%	49.01%	-
Ordinary level	31.60%	Target	32	45%	46	47	48
		Actual	26.34%	28.96%	29.41%	33.19%	-
Advanced level	83.10%	Target	85%	87	89	91	92%
		Actual	84.67%	88%	94.60%	94.58%	-

9.3 Literacy vs. Practical Skills

Zimbabwe's literacy rates are commendably high — 94% for women and 93% for men aged 15–49. Additionally, around 80% of adults have some secondary education. These statistics, however, mask a deeper problem: a mismatch between academic achievement and practical skills. The nation continues to face acute shortages in science, technology, engineering and mathematics (STEM) fields as depicted in Table 9.

Table 9: Summary of National Critical Skills Audit Results

Sector	Availability (%)	Surplus/Deficit (%)
Engineering and Technology	6.43	-93.57
Natural and Applied Sciences	3.09	-96.91
Business and Commerce	121	21
Agriculture	12	-88
Medical and Health Sciences	5	-95
Applied Arts and Humanities	82	-18
Average	38.25	-61.75

Source: 2018 National Critical Skills Audit Report

Only Business and Commerce show a surplus, likely due to the popularity of business studies in tertiary institutions — a reflection of societal overvaluation of theoretical and certificate-based education.

9.4 Challenges Facing Skills Development

According to the 2024 Stakeholder Consultation Report, contributing factors include low labour absorption due to stagnant economic growth, lack of structured continuous training programs, outdated curricula and equipment, and overemphasis on academic credentials rather than practical skills. Additionally, there's a lack of soft skills among graduates, high skills flight due to poor remuneration, limited rural education resources, and minimal innovation-driven industrialisation.

9.5 Positive Developments in Innovation

Despite these challenges, Zimbabwe has made notable progress in fostering innovation:

- 13 innovation hubs and industrial parks have been established in tertiary institutions across the country.
- STEM enrolments have increased, reflecting a shift in academic interests, and greater prospects for innovation.
- 182 intellectual property rights were registered — significantly surpassing the target of 28. This is a good foundation for commercialisation and industrialisation under Education 5.0.

This upward trajectory in innovation and R&D is a beacon of hope, indicating the potential for Zimbabwe to pivot towards a knowledge-driven economy, provided the right investments and policy frameworks are sustained.

10. PILLAR 14: DEVOLUTION AND DECENTRALISATION

10.1 Introduction

Zimbabwe's National Development Strategy 1 (NDS1) for 2021-2025 highlights devolution and decentralisation as essential to achieving the country's Vision 2030 of becoming a prosperous, upper-middle-income society. Rooted in the 2013 Constitution, devolution involves transferring power and resources from the central government to provincial and local authorities. This is intended to empower communities, enhance public service delivery, promote inclusive development, and encourage local participation in governance. Devolution is seen as a critical foundation for Zimbabwe's development, although its implementation has faced both progress and significant challenges.

10.2 Achievements and Developments

The government has made legal and policy strides by prioritising devolution and introducing legislative reforms aimed at clarifying the structure and roles of provincial and metropolitan councils. A key policy principle is "leaving no one and no place behind," which supports equitable resource distribution. Financially, the government has allocated funds to local authorities through inter-governmental fiscal transfers based on population, poverty, and infrastructure needs. These funds have supported thousands of projects, including clinics, schools, boreholes, roads, social amenities, and energy infrastructure, especially in marginalized rural areas. These developments have had visible impacts on service delivery, although public opinion on their effectiveness is mixed. The policy also promotes local-level decision-making by decentralising authority, though this has not been fully embraced due to entrenched top-down governance practices.

10.3 Challenges Experienced

A major hurdle is the incomplete legal framework for devolution, with no comprehensive Provincial Councils Act enacted 12 years after the constitutional provision. The proposed Provincial and Metropolitan Councils Bill has been delayed and criticized for retaining excessive central government control, lacking binding public participation mechanisms, and failing to explicitly involve vulnerable social groups and residents' associations. Despite the transfer of some funds, centralisation persists, with local budgets often requiring ministerial approval and presidential appointees retaining significant control, undermining local

autonomy. This weak engagement undermines the democratic intent of devolution and risks it becoming a top-down administrative change rather than a genuine empowerment of citizens.

10.4 Financial Constraints and Mismanagement

While devolution funds have been allocated, actual disbursements are frequently late, insufficient, or withheld entirely. Between 2019 and 2022, only an average of 11.88% of allocated funds were disbursed, far below the constitutional mandate of at least 5% of the national budget (Table 10). This gap reflects the difference between policy intent and execution, hampering local authorities' ability to implement projects effectively. Additionally, audits reveal that funds are sometimes diverted, misused, or unaccounted for, with some councils spending large portions on unapproved projects and violating procurement regulations. Monitoring by the Ministry of Local Government has been limited, further exacerbating **accountability issues.**

Table 10: Devolution allocations against disbursements (2019-2022)

Year	2019	2020	2021	2022	Total
Currency	**ZW$**	**ZW$**	**ZW$**	**ZW$**	**ZW$**
Amount Allocated	703 000 000	2 932 000 000	19 540 000 000	42 000 000 000	64 743 000 000
Amount Disbursed	658 624 863	1 035 445 396	1 162 000 000	1 400 000 000	7 694 070 259

10.5 Capacity and Institutional Weaknesses

Many local authorities lack the necessary skills and institutional capacity to manage projects, finances, and monitoring effectively. Skills gaps in planning, financial management, and proposal development persist, although the government has deployed specialists to help mitigate these challenges. Institutional weaknesses include poor financial controls, delayed or incomplete financial reporting, and governance issues such as weak inventory and cash management. Furthermore, political interference by central government ministries undermines local councils' autonomy, with politically motivated decisions affecting fund disbursement and governance processes, ultimately hindering the devolution agenda.

10.6 Political and Administrative Resistance

Many local authorities lack the necessary skills and institutional capacity to manage projects, finances, and monitoring effectively. Skills gaps in planning, financial management, and proposal development persist, although the government has deployed specialists to help mitigate these challenges. Institutional weaknesses include poor financial controls, delayed or incomplete financial reporting, and governance issues such as weak inventory and cash management. Furthermore, political interference by central government ministries undermines local councils' autonomy, with politically motivated decisions affecting fund disbursement and governance processes, ultimately hindering the devolution agenda.

10.7 Citizen Participation and Awareness

Public understanding and participation in devolution remain low. Many citizens are unaware of what devolution means or how they can engage with local and provincial councils. Poor communication by local authorities, lack of sustained civic education, and limited access to information—especially in rural areas—have left communities disconnected from decision-making processes. Often, community

consultations are tokenistic and ineffective, resulting in projects that do not always address local needs. This weak engagement undermines the democratic intent of devolution and risks it becoming a top-down administrative change rather than a genuine empowerment of citizens.

10.8 Lessons Learnt

Several critical lessons emerge from Zimbabwe's devolution experience:

1. **Political Will is Crucial:** The slow implementation highlights a lack of strong political commitment to transferring power from central to local government.
2. **Financial Discrepancies Undermine Progress:** A large gap between allocated and disbursed funds (only about 12% disbursed between 2019 and 2022) shows central government's continued financial control limits local autonomy.
3. **Incomplete Legal Framework Creates Ambiguity**: Without a comprehensive Provincial and Metropolitan Councils Act, local authorities lack clear guidance, enabling central ministries to delay or weaken devolution efforts.
4. **Capacity Gaps Hinder Implementation:** Local authorities often lack skills in project management, financial oversight, and monitoring, exacerbated by institutional weaknesses and misuse of funds.
5. **Weak Civic Engagement:** The disconnect between the policy and citizens, due to poor civic education and limited participation platforms, prevents devolution from becoming a truly democratic process.

B. RECOMMENDATIONS FOR NATIONAL DEVELOPMENT STRATEGY II (2026 – 2030)

The National Development Strategy 2 (NDS2) is being formulated at a pivotal moment in Zimbabwe's socio-economic trajectory. It builds on the foundations laid by the National Development Strategy 1 (NDS1: 2021–2025), which sought to stabilise the macroeconomic environment, accelerate structural transformation, and foster inclusive and sustainable development. While NDS1 registered progress in key areas such as infrastructure development, energy generation, mining expansion, and modest economic recovery, it also revealed critical implementation gaps and persistent vulnerabilities—particularly in macroeconomic stability, social service delivery, institutional effectiveness, and industrial competitiveness.

1. OVERARCHING RECOMMENDATIONS FOR NDS2

As the Church, it is our view that underlying the above-mentioned gaps and vulnerabilities experienced under NDS1 is deep-rooted polarisation in the political, social, economic, religious, and other spheres of Zimbabwean society. The root cause of this polarisation, or lack of cohesion, is the absence of a shared National Vision which is supposed to glue the nation together and ensure that we all pull in one direction. This is the 'elephant in the room' that has caused the failure of economic blueprints that preceded NDS1, and if not addressed, will be the Archille's heel for the NDS2. While cognisant of Vision 2030, a national vision should go beyond the achievement of economic targets, and should look far into the future – well beyond election cycles. It should be the nation's guiding light, whose ethos are subscribed to by any political party that comes into power. Political party manifestos should be judged upon which one better speaks to the achievement of the National Vision.

A national vision is a collective aspiration that defines a country's identity, values and long-term goals; serving as a guiding framework for policy, governance, and citizen engagement. Its key elements should be inclusivity (no ethnic, class or political discrimination); shared ownership (co-creation and commitment); shared values (built on principles of unity, justice, equality, tolerance, and respect for human rights to create a cohesive national identity); clarity and feasibility (set realistic targets); and be guided by a conflict-sensitive approach (address historical imbalances and foster healing). A national vision is thus the bedrock of unity, peace, justice, and reconciliation which are critical ingredients for nation building and shared prosperity.

While inroads had been made in the direction of social dialogue through the establishment of the Tripartite Negotiation Forum (TNF) which brings together government, organised business and organised labour with a view to coming up with a social contract; traction has been very slow and the social contract remains elusive. On the other hand, the National Truth and Reconciliation Commission (NPRC), which was meant to address past hurts and usher in national reconciliation came to its demise without having accomplished its mandate. It is the Church's assertion that these two critical institutions have made little impact because they lacked the foundation of a cohesive nation which is committed to shared prosperity as guided by a shared National Vision. In other words, their establishment in the absence of a shared National Vision was premature, akin to 'putting the cart before the horse'.

In this respect, our paramount recommendation for the National Development Strategy 2 is:
·the initiation of national dialogue on, and the subsequent crafting of a shared National Vision for Zimbabwe.
·Its development should be guided by an inclusive, comprehensive and broad-based national consultative process that captures and amplifies the voices of the marginalized and the ordinary people, leaving non one and no place behind.
· Processes should be transparent and accountable; ensuring conscientization of the entire population through community engagement programmes to promote shared ownership.

As the age-old adage says, "United We Stand, Divided We Fall", with the existing polarisation, each one

pulling in their own direction, we will not achieve Vision 2030 – we are doomed to fail. It is upon these over-arching recommendations, that the following recommendations are given for the ten NDS2 Strategic Priorities.

2. STRATEGIC PRIORITY 1: MACRO-ECONOMIC STABILITY AND FINANCIAL SECTOR DEEPENING

Zimbabwe's macroeconomic environment remains fragile with persistent inflation volatility, fiscal pressures, and exchange rate instability. Public debt levels constrain fiscal space, while financial markets lack depth, limiting investment finance and inclusion. The existing multi-currency regime hampers monetary policy effectiveness, necessitating transition to a credible single-currency system.

2.1 Anchor currency stability in reserves and transparency

- Publish weekly monthly international reserve balances (gold + FX) with quarterly independent audits.
- Target import cover of at least 3 months (SADC convergence benchmark is 6 months; Zimbabwe currently <1.5).
- Align issuance of Treasury Bills with actual fiscal space to comply with the Public Finance Management Act.
- Convertibility & Physical Cash Access: Guarantee banked ZiG can be converted to USD without arbitrary restrictions; issue low-denomination ZiG notes/coins; expand ATM and agent coverage.

2.2 Curb inflation through monetary discipline

- Set reserve money growth ceilings tied directly to reserve accumulation, in line with Milton Friedman's dictum that inflation is always a monetary phenomenon.
- Strengthen RBZ independence to prevent fiscal dominance, consistent with Section 300 of the Constitution which requires parliamentary approval for government borrowing.
- Medium-term inflation should be targeted at single digits (<7%) consistent with SADC macroeconomic convergence targets.
- Administered Price Management: Implement quarterly glide-path for utility tariffs; transparent pricing formulas for ZESA, water, and public transport.

2.3 Debt management and fiscal sustainability

- Enforce compliance with the Public Debt Management Act [Chapter 22:21], which caps debt at 70% of GDP – Zimbabwe stood at 99.6% of GDP in 2023 before rebasing, and ~44% post-rebasing.
- Fast-track arrears clearance under the AfDB-led Debt Resolution Framework, coupled with reprofiling and partial relief negotiations.
- Broaden the tax base to lift tax-to-GDP from 14% (post-rebasing) toward the 22–25% median for middle-income economies by 2030.
- Fiscal Discipline & Debt Control: Maintain non-mineral primary surplus; publish Treasury payment calendar; 95% of invoices paid within 30 days; debt ≤ 40% of GDP.

2.4 Deepen financial markets for private sector credit

- Develop a functional yield curve to allow long-term borrowing and investment planning.
- Safe Credit Expansion: Gradual reserve requirement reduction; targeted, sterilised refinance facilities for productive sectors.

2.4 Deepen financial markets for private sector credit

- Exchange Rate Flexibility & Market Depth: Allow full interbank price discovery without moral suasion; require all public FX inflows to be sold on market; publish interbank FX volumes daily.

- Forex Surrender Reform: Gradual reduction of surrender requirement from 30% to ≤ 20%, aligned with cost structures; settlement within 48 hours.
- Data Transparency & Policy Predictability: Release monetary/FX data monthly; publish MPC minutes; unify CPI methodology; align RBZ & Treasury statements.

3. STRATEGIC PRIORITY 2: INCLUSIVE ECONOMIC GROWTH AND STRUCTURAL TRANSFORMATION

3.1 Lock in macro stability to unlock inclusion and structural change.

- Publish and adhere to a market-led, widely consulted de-dollarisation roadmap targeting a trusted mono-currency by 2030, sequenced with deep convertibility, reserve adequacy (≥3 months of import cover), and strict reserve-money growth caps consistent with single-digit inflation.
- Hard-wire fiscal rules (primary balance anchors; debt brake with 70% of GDP ceiling in line with the Public Debt Management Act) to protect price stability and restore policy credibility that NDS1 struggled to sustain.

3.2 Power first: treat electricity as the growth and jobs enabler.

- Move from ad-hoc additions to a bankable, time-bound build-out plan: (i) fully evacuate Hwange 7&8's 600MW through financed transmission upgrades; (ii) fast-track 300–500MW of IPP solar + storage via standardised PPAs; (iii) ring-fence industrial power (steel, lithium, agro-processing) with performance contracts linked to local content and jobs.

3.3 Slash the cost of doing business and formalise at scale.

- Launch a single-window, fully digital licensing system with service-level agreements that cut start-to-operate time to ≤5 days, and consolidate overlapping sector permits into one composite licence per sector.
- Conclude and implement the formalisation strategy; Introduce a graduated formalisation ladder: zero-cost e-registration, e-invoicing by default, presumptive turnover tax bands, and procurement set-asides for newly formalised MSMEs, tying incentives to digital compliance rather than paperwork.
- Reduce Transaction Costs & Cash Frictions: Reform IMTT to exempt B2B production/payroll payments; cap merchant bank charges; remove withdrawal levies; standardise e-payment tariffs.
- Introduce time-bound approvals with "silence is consent" rules in investment licensing; publish border-post time-release studies quarterly and tie agency bonuses to clearance-time improvements.

3.4 Rebuild rail as an industrial policy—NRZ as a cost killer.

- Conclude brownfield PPP concessions for heavy-haul corridors (Beitbridge–Harare–Chirundu; Harare–Mutare) with availability-based payments and regulated track-access charges; target a 30–40% modal shift from road to rail for bulk minerals, fuel, and fertiliser within 36 months to compress logistics costs.

3.5 Anchor beneficiation with "Beneficiation Anchor Zones" and offtake-backed finance.

- Establish 3–4 zones (PGMs/steel in Midlands; lithium in Mashonaland West; edible oils & cotton-to-clothing in Mashonaland Central/West; leather in Matabeleland) with: duty-free capital imports, ring-fenced power & water, and fast-track land/permits; conditional on export earnings, local content, and skills transfer KPIs.
- Phase in processing mandates only where grid/power, feedstock contracts, and finance are in place to avoid "paper beneficiation."

3.6 Finance the transformation: crowd in capital where it matters.

- Capitalise a National Industrial & Infrastructure Fund with blended finance (sovereign, pension funds, DFIs) and partial credit guarantees for SME cluster equipment, warehouse-receipt finance for agriculture, and export working-capital lines for commissioning plants.
- Deploy a PPP Guarantee Facility (limited, priced) to bring large logistics/energy projects to financial close while protecting the fiscus.

3.7 Targeted FDI and after-care, quality over quantity.

- Shift to performance-based incentives tied to domestic value-add (e.g., % of mineral processed locally; % of inputs sourced locally; export earnings per unit of concession). Pair this with a One-Stop Investment Centre that includes after-care to retain and expand.
- Upgrade SEZs: harmonise regulations/incentives and add investor protections and customs simplification to realise their unrealised potential.

3.8 Rural industrialisation, turn value chains into local jobs.

- Stand up agro-industrial parks/commodity clusters near production (edible oils, dairy, beef, cotton) with feeder roads, cold chains, and processing credit; condition incentives on smallholder offtake and community employment targets.

4. STRATEGIC PRIORITY 3: INFRASTRUCTURE DEVELOPMENT AND HOUSING

- Infrastructure is the backbone of economic transformation. Zimbabwe's competitiveness hinges on (i) reliable power, (ii) resilient road and rail corridors, (iii) sustainable water and sanitation, and (iv) accessible housing. The challenge is not a lack of plans or statutes — it is enforcement, bankability, and ring-fencing. The priority for NDS2 is therefore to make infrastructure investable and accountable, guided by existing legal instruments: Public Finance Management Act (PFMA), Public Procurement and Disposal of Public Assets Act (PPDPA), Joint Ventures Act, ZERA Act, and Roads Act.

4.1 Infrastructure Development

4.1.1Power & Energy

- Adopt bankable IPP frameworks with Government Project Support Agreements (GPSAs) guaranteeing cost-reflective tariffs, convertibility, and grid offtake.
- Implement competitive auctions for renewables; introduce wheeling frameworks to allow private mines/industries to trade power across ZETDC's grid.

4.1.2 Roads

- Retain ZINARA Road Fund ring-fencing, but publish quarterly corridor-level accounts showing collections, allocations, and works.
- Enforce quality standards for material and work done by contractors to ensure value for money with explicit sanctions for sub-standard work
- Adopt to Performance-Based Maintenance Contracts (PBMCs) with KPIs (roughness, axle-load compliance, safety).

4.1.3 Rail

- Concession Beitbridge–Harare–Chirundu and Harare–Mutare under PPPs with regulated track-access charges.
- Target: 30–40% freight modal shift from road to rail by 2029.
- Upgrading and modernization of the rail network with the transition earmarked for high-speed locomotives.

4.1.4 Air

- Complete and operationalize airport upgrades (RG Mugabe, Joshua Mqabuko Nkomo, Victoria Falls, Kariba) with international safety and security compliance (ICAO standards).
- Ring-fence Civil Aviation Authority of Zimbabwe (CAAZ) revenues for reinvestment into aviation infrastructure, rather than cross-subsidising other expenditures.
- Establish aviation PPPs for cargo terminals and airport city developments (hotel, logistics parks, bonded warehouses) to leverage Zimbabwe's hub potential for SADC.
- Introduce Open Skies policies under the African Continental Free Trade Area (AfCFTA) and Single African Air Transport Market (SAATM) to expand routes and reduce freight/passenger costs.

4.1.5 Water & Sanitation

- Enforce utility turnaround compacts: ring-fence revenues, publish NRW/service dashboards, and link PFMA transfers to KPIs.
- Scale bulk water PPPs (dams, trunk mains, treatment) with a Municipal Infrastructure Facility.

4.2 Housing

4.2.1 Enforce a clear regularisation policy

- NDS 2 should mandate a national, non-negotiable policy that prioritises regularisation and on-site upgrading over demolitions where established minimum conditions are met. This policy must include fast-tracking official tenure documents and securing dedicated infrastructure funding to provide essential services to these settlements. For the few settlements on unsafe land (e.g., wetlands), a clear and humane resettlement plan must be in place before any action is taken.

4.2.2 Establish a robust, low-cost housing finance ecosystem

- The Housing Fund should be transformed into a transparent, low-interest (2-5% per annum) lending facility specifically for low-income and first-time buyers. The government should also provide targeted subsidies for infrastructure development and tax incentives for developers building affordable homes.

4.2.3 Standardise and mainstream alternative building technologies

- A supportive ecosystem is needed to move these technologies beyond the "work-in-progress" phase. This can be achieved by establishing national standards and certification, subsidising the local production of eco-friendly materials, and mandating their use in government-funded projects to build public trust.

4.2.4 Promote financial/technical innovation

- Come up with new, innovative approaches to the management of housing cooperatives and community savings groups; providing them with serviced land and technical support.
- Unlock serviced land through PPPs, with step-in rights if milestones are missed.
- Reduce mortgage transfer duties/fees and launch covered bonds for long-term finance.

5. STRATEGIC PRIORITY 4: FOOD SECURITY, CLIMATE RESILIENCE AND ENVIRONMENTAL PROTECTION

5.1 Food Security

- Timely distribution of farming inputs (seeds, fertilizer, chemicals) under programmes such as Pfumvudza/Intwasa, among others
- Fair and transparent beneficiary selection for agricultural support.
- Promotion of household and community nutrition gardens.
- Increased nutrition education, especially for mothers and any other caregivers.
- Proper maintenance of existing, and construction of new grain storage facilities to reduce post-harvest losses.
- Improved market access and government-guaranteed minimum pricing for crops.
- Training on climate-smart and drought-resistant farming practices.
- Well-targeted and timely distributed food aid for vulnerable households.
- The Government should subsidise mealie meal so that everyone can afford the staple food.

5.3 Environmental Protection

- The government's conservation efforts must take a holistic approach to avoid situations where some citizens are unaware of its initiatives in this area, which has a bearing on its success.
- Environmental laws must be enforced without fear or favour, that is, same treatment of offenders, whether local or foreign.
- The government's environmental protection and natural resource management policies and programmes should be given high importance, rather than the current scenario, where they are largely not visible until there is an international forum.
- Environmental protection needs to take precedence over the unsustainable exploitation of natural resources.
- Investments in climate change-related programmes and projects must be increased to cover the whole country.

6. STRATEGIC PRIORITY 5: TECHNOLOGY, INNOVATION AND HUMAN CAPITAL DEVELOPMENT

6.1 Technology

- Prioritise technology transfers under foreign direct investments
- Incentivise importation of high-tech or new-tech equipment through tax rebates to promote modernisation of production in the country

6.2 Innovation

- Deepen university-industry linkages on research and development

1. Turn innovation hubs into Challenge Funds for factory automation, quality upgrading, and green process retrofits;
2. co-fund apprenticeships with firms in priority clusters.

- Deliberate talent identification along the primary-secondary-tertiary education continuum and provision of necessary support though the innovation and incubation hubs
- Create a culture of celebrating and supporting our own innovators rather than demonise them (e.g. the Daniel Chingoma case)
- Offer incentives for innovation in the form of financial and technical support; intellectual property rights

6.3 Human Capital Development

- The government could consider collapsing the ministries responsible for primary and secondary education; and the ministry responsible for tertiary education into one ministry with the three components under the purview of permanent secretaries or chief directors. The objective is to ensure the alignment of education delivery throughout the continuum and reduce turf wars and confusion.
- Introduction of an Annual Skills Indaba coordinated by the Ministry of Skills Audit bringing together ministries responsible for education and training; academia and training & research institutes; industry; development partners; civil society and other relevant stakeholders to review the education, training and skills landscape to inform the curricula and address skills gaps
- Preserving the country's high literacy rate while turning it into economic value through skills training.
- There is a need for stronger collaboration between research institutions and industry, improved retention strategies for skilled professionals, and the modernization of training facilities.
- Additionally, curricula should be reviewed regularly to ensure alignment with evolving labour market demands.
- Emphasis must also be placed on developing soft skills, promoting entrepreneurship, and improving access to quality education in rural areas.
- Offering scholarships targeting critical skills as informed by an updated and well consulted National Skills Audit

7. STRATEGIC PRIORITY 6: JOB CREATION, YOUTH DEVELOPMENT, CREATIVE INDUSTRY AND CULTURE

7.1 Job Creation

- Employment should be a major macroeconomic policy target that is consistently measured, tracked and reported across all sectors of the economy regularly. Employment targets should be explicit and not left to chance. It is the variable that directly speaks to the ordinary man on the ground. It should be disaggregated by sector and demographics. Its sub-elements such as unemployment, under-employment/quality, and decency should be analysed to inform policy
- Local employment creation and technology transfer should be a key metric in the evaluation of foreign investment proposals by the Zimbabwe Investment Development Agency (ZIDA)
- Efforts should be made to ensure that the Zimbabwe National Employment Policy Framework should be streamlined in the operations of all ministries, departments, and agencies as well as the non-state actors, the private sector included.

7.2 Youth development

- Vocational training curricula should speak to the resources and comparative advantages of the areas they are located. For example, forestry courses in the Eastern Highlands, agricultural courses in high potential agricultural (both crop and livestock) areas, mining courses mining areas. This will increase chances of getting employment or setting up viable enterprises after training. Requisite support for the procurement of required technologies, equipment and laboratories will be needed
- Linkages between vocational training institutions and companies operating in their areas for demand-based curriculum development, attachment/employment and sub-contracting/out-grower opportunities should be pursued.

7.3 Creative Industry

- Create awareness among artists in the creative industry on the revenue opportunities offered by ICT/social media platforms such as Spotify, YouTube, TikTok, Instagram among others. Training on how to reach international audiences and markets, and monetise their talents through these platforms is needed.

8. STRATEGIC PRIORITY 7: SOCIAL DEVELOPMENT AND SOCIAL PROTECTION

8.1 Health

- Budget disbursements to the Ministry of Health towards upgrading of health facilities and procurement of critical equipment and medicines should be prioritised.
- Identification of local private funding partners as well as leveraging on the diaspora community for health sector support should be pursued with urgency in the wake of reduced foreign donor support.
- Red tape and politicking should be avoided in this space.
- Scaling up awareness campaigns and testing of non-communicable diseases (NCDs) which are quickly becoming a major cause of morbidity and mortality in the country across all age groups. An NCD strategy needs to be quickly put in place.
- Government should improve the welfare of health staff to prevent/reduce the massive brain drain.
- Government should promote better public hospital management, recruit more staff, and improve the quality of healthcare delivery.
- Scaling up of efforts towards improving access to safe and reliable water sources in both rural and urban areas. Borehole drilling programmes are commendable and should incorporate a repair & maintenance element with community buy-in/participation to ensure sustainability of water supply.
- More efforts needed towards reducing maternal, infant, under 5 and neonatal mortality rates to the targeted minimum rates.
- Government and partners encouraged to continue promoting the use of modern family planning methods among married women through provision of more affordable family planning methods and medical provisions in all public institutions.

8.2 Social Protection

- There is an urgent need for national health insurance coverage to improve access to health for the vulnerable citizens of Zimbabwe in the work of massive informalisation and unemployment.
- The Social Registry initiative should be expedited to improve targeting, planning and implementation of social protection programmes such as the BEAM, harmonised cash transfers and food aid. The Social Registry should be hosted on a reliable ICT system that is manned by well-trained, well resources staff and accessible at all levels of operations with staff having the requisite credentials and internet connectivity to access the system.
- In light of the poor implementation and operation of the Basic Education Assistance Module (BEAM), the government could

1. Consider moving the BEAM operations from the Ministry of Public Service, Labour and Social Welfare, to the Ministry of Primary and Secondary Education to remove bureaucratic hurdles and turf wars between the two ministries.
2. A new management information system for the BEAM which is connected to the Public Finance Management System should be set up as a matter of urgency to improve accountability. Operating the BEAM system on Excel as reported in the Auditor General's Reports is not acceptable..
3. A review of the BEAM operational structure at all levels should be reviewed to provide clarity of the role of all the stakeholders and improve coordination.
4. Treasury should improve timeliness of BEAM funds disbursements to ensure that beneficiaries are not disadvantaged by being sent away from school and losing their dignity; and schools receive the funds whilst they still have value

9. STRATEGIC PRIORITY 8: REGIONAL DEVELOPMENT AND INCLUSIVITY THROUGH DEVOLUTION AND DECENTRALISATION

9.1 Finalize Devolution Legal Framework:

- Enact the Provincial and Metropolitan Councils Act to clearly define roles, powers, and reduce ministerial control, enabling councils to claim devolved powers confidently.

9.2 Ensure Consistent Fiscal Transfers:

- The government must meet the constitutional requirement of allocating at least 5% of the national budget for devolution and ensure timely disbursement, with independent oversight for accountability.

9.3 Build Local Authorities' Capacity:

- Implement comprehensive training in financial management, procurement, and project evaluation, recruit skilled personnel, and establish transparent financial systems to prevent fund misuse.

9.4 Promote Citizen Participation and Civic Education:

- Launch sustained education campaigns and establish accessible platforms for meaningful public engagement to foster community ownership of local development.

9.5 Address Political and Administrative Resistance:

- Foster a culture of decentralization within central ministries and hold officials accountable for obstructing the devolution process, demonstrating genuine political will for power-sharing.

10. STRATEGIC PRIORITY 9: IMAGE BUILDING, INTERNATIONAL DIPLOMACY AND TRADE

- Efforts should be primarily anchored on how the government is perceived by its own citizens at home in the areas of public service delivery, good governance, holding free and fair elections and protection of human rights and rule of law.

1. These tainted the country's image and international relations in the first place. Without a positive national image among citizens, it is challenging to maintain a favourable international image of the country.
2. The country's citizens should be its primary ambassadors, telling and celebrating the Zimbabwean story at home; abroad and on social media and other platforms

- Zimbabwe should learn to tell its own story in terms of its success stories riding on social media platforms and national television production. More investments in high quality content creation is needed.

1. The ministry responsible for information and broadcasting, as well as the Zimbabwe Broadcasting Corporation (funded by the car radio licences) should take the lead in this space.
2. Both foreign and local bureaucrats and embassy officials should be well trained in marketing Brand Zimbabwe. In the age of social media and ICT advances, careless statements and conduct can easily tarnish the image of the country.
3. All ministries, departments and agencies should have spokespersons well-trained in marketing, international relations and diplomacy to handle government related communications.

11. STRATEGIC PRIORITY 10: GOOD GOVERNANCE, INSTITUTION BUILDING, AND SECURITY

- More work needs to be done to build social cohesion and the National Peace and Reconciliation Commission needs to be resuscitated as a matter of urgency so that it can carry on with its work and do better where it did not.
- Amend the Tripartite Negotiating Forum Act to make TNF decisions binding on Cabinet and expedite the conclusion of the social contract.
- The government needs to do more to reform and strengthen its institutions to deliver public services.

1. Undertake reforms to strengthen the independence of the judiciary and Parliament,
2. Parliamentary oversight needs to be strengthened. The Public Accounts Committees annd Parliamentary Portfolio Committees should discharge their duties professionally and be accorded the respect they deserve.
3. Enforceable sanctions for non-implementation of audit recommendations by the Office of the Auditor General should be implemented.
4. Non-performing public officials should be fired; these clauses should be included in their performance contracts.
5. E-governance which brings online traceability of processes can enhance efficiency
6. Genuine and wide-ranging parastatal reform is long overdue. Heads must roll

- The area of public safety and order also needs serious investment to empower the law enforcement agencies to be able to do their job and gain trust from the citizens.
- The government must do more to address the challenge of corruption, which remains deep-rooted in the country in both the public and private sectors.

1. The digitalisation of services can reduce human interface and as such, vices such as bribery in some processes
2. Increased prosecution in corruption cases being handled by the Zimbabwe Anti-Corruption Commission without fear or favour.

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