Republic of Zimbabwe

"Towards a Prosperous & Empowered Upper Middle Income Society by 2030"

NATIONAL DEVELOPMENT STRATEGY 1

January 2021 – December 2025

16 November 2020
TABLE OF CONTENTS
ZIMBABWE FACT FILE ................................................................................................................ii
ZIMBABWE MAP ........................................................................................................................ iii
FOREWORD ...................................................................................................................................iv
PREFACE ..................................................................................................................................... vi
NDS1 EXECUTIVE SUMMARY .....................................................................................................ix
ACRONYMS .............................................................................................................................. xviii

CHAPTER 1 ................................................................................................................................ 1
CONTEXT OF THE NATIONAL DEVELOPMENT STRATEGY 1 (2021-2025) ............................. 1
  Introduction ................................................................................................................................ 1
  Policy Thrust under the Second Republic ...................................................................................... 2
  Transitional Stabilisation Programme (TSP) ................................................................................... 3
  Thrust of the National Development Strategy 1: 2021-2025 ........................................................... 5
  Managing for Development Results under NDS 1 .......................................................................... 8
  NDS1 Key Success Factors ......................................................................................................... 11
  NDS1 Cross Cutting Issues ........................................................................................................ 13

CHAPTER 2 .............................................................................................................................. 14
NDS1 MACROECONOMIC FRAMEWORK .................................................................................. 14
  Recent Economic Developments ................................................................................................ 14
  Macroeconomic Outlook ............................................................................................................ 16
  Key Pillars of the NDS1 .............................................................................................................. 18
  Overview of NDS1 National Priorities .......................................................................................... 19
  Fiscal, Monetary and External Sectors ........................................................................................ 24

CHAPTER 3 .............................................................................................................................. 26
ECONOMIC GROWTH AND STABILITY ................................................................................. 26
  Introduction .............................................................................................................................. 26
  Sustainable Economic Growth .................................................................................................... 26
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Strategies for Sustainable Economic Growth</td>
<td>28</td>
</tr>
<tr>
<td>The Locomotive Sectors for Sustainable Growth</td>
<td>29</td>
</tr>
<tr>
<td>Key strategies for productive sectors</td>
<td>29</td>
</tr>
<tr>
<td>Strategies for tourism</td>
<td>34</td>
</tr>
<tr>
<td>Macroeconomic Stability</td>
<td>38</td>
</tr>
<tr>
<td>Monetary Policy</td>
<td>38</td>
</tr>
<tr>
<td>Financial Sector Stability</td>
<td>42</td>
</tr>
<tr>
<td>Fiscal Policy</td>
<td>46</td>
</tr>
<tr>
<td>Expedite State Enterprises and Parastatal Reforms.</td>
<td>53</td>
</tr>
<tr>
<td>Public Debt Management Strategies</td>
<td>55</td>
</tr>
<tr>
<td>Inclusive Growth</td>
<td>57</td>
</tr>
<tr>
<td>Decent Work</td>
<td>57</td>
</tr>
<tr>
<td>CHAPTER 4</td>
<td>61</td>
</tr>
<tr>
<td>FOOD AND NUTRITION SECURITY</td>
<td>61</td>
</tr>
<tr>
<td>Introduction</td>
<td>61</td>
</tr>
<tr>
<td>Situational Analysis</td>
<td>61</td>
</tr>
<tr>
<td>Cereal Production</td>
<td>62</td>
</tr>
<tr>
<td>Livestock Production</td>
<td>63</td>
</tr>
<tr>
<td>Access to Food</td>
<td>64</td>
</tr>
<tr>
<td>Horticulture</td>
<td>68</td>
</tr>
<tr>
<td>Global Compensation Agreement</td>
<td>74</td>
</tr>
<tr>
<td>Irrigation Development and Water Harvesting</td>
<td>77</td>
</tr>
<tr>
<td>Nutrition Security</td>
<td>78</td>
</tr>
<tr>
<td>Nutrition Security Outcomes</td>
<td>78</td>
</tr>
<tr>
<td>CHAPTER 5</td>
<td>81</td>
</tr>
<tr>
<td>STRUCTURAL TRANSFORMATION AND VALUE CHAINS</td>
<td>81</td>
</tr>
<tr>
<td>Introduction</td>
<td>81</td>
</tr>
<tr>
<td>Situational Analysis</td>
<td>81</td>
</tr>
</tbody>
</table>
Strategies to Improve Uptake and Application of STEM /STEAM Subjects ........................................ 156
Specialist Skills for Industry, Commerce and Public Sector .......................................................... 157
Strategies to improve availability of Specialist Skills for Industry, Commerce and Public Sector ... 157
Innovation, Science and Technology Development ...................................................................... 158
Strategies to improve Innovation, Science and Technology Development ................................. 158
Science and Technology Innovation Ecosystems ........................................................................ 159
Strategies to improve Science and Technology Innovation Ecosystems ..................................... 160

CHAPTER 9 .................................................................................................................................. 162

HEALTH AND WELLBEING ...................................................................................................... 162

Introduction .................................................................................................................................. 162
Public Health and Well-being ....................................................................................................... 162
Improving quality of life ................................................................................................................ 165
Improving domestic funding for health ........................................................................................ 165
Improving human resource performance in the health sector ...................................................... 166
Improving Access to Essential Medicines .................................................................................... 166
Improving Access to Primary & Secondary Health Care and Enabling Environment for Health Services Delivery.......................................................................................................................... 167
Reducing Morbidity and Mortality due to Communicable and Non-Communicable Diseases ...... 168
Healthy Lifestyles and Sport for Health Purposes ....................................................................... 169
Access to Water, Sanitation and Healthy Environment ................................................................. 169

CHAPTER 10 ............................................................................................................................... 171

IMAGE BUILDING, INTERNATIONAL ENGAGEMENT AND RE-ENGAGEMENT .................. 171

Situational Analysis ...................................................................................................................... 171
Image Building ............................................................................................................................. 172
Informed Nation and International Community .......................................................................... 173
Competitive Branding .................................................................................................................. 174
International Relations ................................................................................................................. 175
Improving Diaspora Participation in National Development ..................................................... 176
CHAPTER 11 .......................................................................................................................... 177

DE Volu lon And DE Ce n trali s ati on ......................................................................................... 177

Introduction ............................................................................................................................ 177
Situation Analysis ..................................................................................................................... 177
Devolution and Decentralisation Policy .................................................................................... 179
Inclusive Governance and Socio-Economic Development ......................................................... 180
Strategies to Improve Inclusive Governance and Socio-Economic Development ..................... 181
Programmes to Improve Inclusive Governance and Socio-Economic Development .................. 182

CHAPTER 12 .......................................................................................................................... 184

CROSS CUTTING ISSUES ................................................................................................... 184

Youth, Sport, Art, Culture and Gender Mainstreaming ................................................................ 184
Introduction ............................................................................................................................ 184
Youth ..................................................................................................................................... 184
Situational Analysis ................................................................................................................. 184
Improving Youth Participation ............................................................................................... 185
Programmes ........................................................................................................................... 186
Gender Mainstreaming ............................................................................................................ 187
Strategies in Mainstreaming Gender in the Development Process ............................................ 188
Outcomes on Youth, Women and Gender Mainstreaming ......................................................... 189
Strategies to Achieve Gender Mainstreaming .......................................................................... 189
Sport, Arts and Culture .......................................................................................................... 190
Increasing Participation in Sport and Recreation ....................................................................... 191
Strategies ............................................................................................................................... 191
Programmes ........................................................................................................................... 191
Financial Inclusion ................................................................................................................ 195
Social Protection, Poverty Alleviation and Safety Nets ............................................................. 196
Introduction ............................................................................................................................ 196
Situational Analysis ................................................................................................................. 197
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality and Affordable Social Protection</td>
<td>198</td>
</tr>
<tr>
<td>Reducing Extreme Poverty and Improving Access to Basic Social Services</td>
<td>198</td>
</tr>
<tr>
<td>Strategies to Improve Access to Basic Social Services</td>
<td>199</td>
</tr>
<tr>
<td>Programmes and Projects</td>
<td>200</td>
</tr>
<tr>
<td>Improving Care and Protection of Vulnerable groups</td>
<td>200</td>
</tr>
<tr>
<td>Strategies to Care and Protection of Vulnerable groups</td>
<td>201</td>
</tr>
<tr>
<td>Programmes and Projects</td>
<td>201</td>
</tr>
<tr>
<td>Improving livelihoods for the Poor and Vulnerable</td>
<td>202</td>
</tr>
<tr>
<td>Programmes and Projects</td>
<td>202</td>
</tr>
<tr>
<td>Enhancing Job and Income Security</td>
<td>203</td>
</tr>
<tr>
<td>Strategies</td>
<td>203</td>
</tr>
<tr>
<td>Programmes and Projects</td>
<td>204</td>
</tr>
<tr>
<td>Environmental Protection, Climate Resilience and Natural Resources Management</td>
<td>205</td>
</tr>
<tr>
<td>Introduction</td>
<td>205</td>
</tr>
<tr>
<td>Environment and Climate Protection</td>
<td>205</td>
</tr>
<tr>
<td>Situation Analysis</td>
<td>205</td>
</tr>
<tr>
<td>Protected Environment</td>
<td>207</td>
</tr>
<tr>
<td>Governance</td>
<td>214</td>
</tr>
<tr>
<td>Introduction</td>
<td>214</td>
</tr>
<tr>
<td>Public Service Delivery</td>
<td>214</td>
</tr>
<tr>
<td>Transparency and Accountability</td>
<td>217</td>
</tr>
<tr>
<td>Disaster Risk Management</td>
<td>218</td>
</tr>
<tr>
<td>Strategies</td>
<td>218</td>
</tr>
<tr>
<td>Consumer Satisfaction</td>
<td>218</td>
</tr>
<tr>
<td>Ease of Doing Business</td>
<td>219</td>
</tr>
<tr>
<td>Justice Delivery</td>
<td>220</td>
</tr>
<tr>
<td>Human Rights and Freedoms</td>
<td>223</td>
</tr>
<tr>
<td>Combating Corruption</td>
<td>223</td>
</tr>
</tbody>
</table>
LIST OF FIGURES

Figure 1: National Economic Blueprints and Real GDP growth rates: 1980-2020 ...................................... 1
Figure 2: Development Framework for Vision 2030 ............................................................................... 2
Figure 3: NDS1 Pathways of change towards Vision 2030 ...................................................................... 7
Figure 4: Road map to the achievement of Vision 2030 aspirations ...................................................... 10
Figure 5: Real GDP Growth .................................................................................................................. 27
Figure 6: Tourism Growth 2015-2018 ................................................................................................. 34
Figure 7: Reserve Bank of Zimbabwe strategic policy framework .......................................................... 40
Figure 8: Fiscal Position: 2012-2020 ................................................................................................... 47
Figure 9: Food Insecurity Trend ......................................................................................................... 62
Figure 10: Cereal Production and Requirements Trends ........................................................................ 63
Figure 11: Structure of the Economy: 1980-2020 ................................................................................ 82
Figure 12: Impact of COVID-19 .......................................................................................................... 83
Figure 13: Composition of Merchant Exports as of 2020 .................................................................... 84
Figure 14: Levels of beneficiation in the PGMs sector ........................................................................ 102
Figure 15: Rare Minerals Value Chains .............................................................................................. 105
Figure 16: Zimbabwe Health Care Financing, 2014-2019 ................................................................... 163
Figure 17: Zimbabwe Population Demographics ................................................................................ 185
Figure 18: Zimbabwe’s Ease of Doing Business Ranking .................................................................... 219
Figure 19: NDSI Implementation, Monitoring and Evaluation Architecture ........................................... 233

LIST OF TABLES

Table 1: Relationship between Vision 2030, SDGs and National Priorities ............................................ 8
Table 2: NDS1 Macroeconomic Framework (2021-2025) .................................................................... 18
Table 3: Sectoral GDP Growth Rates (%) (2019-2025) ........................................................................ 29
## ZIMBABWE FACT FILE

<table>
<thead>
<tr>
<th>Population</th>
<th>14,862,924 (2020 Estimate)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Land area</td>
<td>390,580 km²</td>
</tr>
<tr>
<td>Land</td>
<td>386,670 km²</td>
</tr>
<tr>
<td>Water</td>
<td>3,910 km²</td>
</tr>
<tr>
<td>Border countries and Length</td>
<td>Botswana 813 km, Mozambique 1,231 km, South Africa 225 km, Zambia 797 km</td>
</tr>
<tr>
<td>Climate</td>
<td>Tropical; moderated by altitude; rainy season (November to March)</td>
</tr>
<tr>
<td>Terrain</td>
<td>Mostly high plateau with higher central plateau (high veld); mountains in east</td>
</tr>
<tr>
<td>Natural Resources</td>
<td>Diamonds, coal, chromium ore, asbestos, gold, nickel, copper, iron ore, vanadium, lithium, tin, Platinum Group Metals</td>
</tr>
<tr>
<td>Zimbabwe Geographic coordinates</td>
<td>Zimbabwe is located at latitude -19.015438 and longitude 29.154857</td>
</tr>
<tr>
<td>Officially recognised languages in Zimbabwe</td>
<td>English, Shona, Ndebele, Chewa, Chibarwe, Kalanga, Koisan, Nambya, Ndau, Shangani, sign language, Sotho, Tonga, Tswana, Venda and Xhosa.</td>
</tr>
<tr>
<td>Key Economic sectors</td>
<td>Mining, Manufacturing, Agriculture and Tourism.</td>
</tr>
</tbody>
</table>
Consistent with the collective aspirations and determination of the people of Zimbabwe to achieve an Empowered and Prosperous Upper Middle-Income Society by 2030, the Second Republic launched Vision 2030 to chart a new transformative and inclusive development agenda. It is the pursuit of this vision which will deliver broad based transformation, new wealth creation and expanding horizons of economic opportunities for all Zimbabweans, with no one left behind.

Pursuant to this, Government developed the Transitional Stabilisation Programme (TSP) to guide the reform process during the period 2018 to 2020. Although we faced some challenges along the way, significant progress was made in the implementation of the TSP across its various pillars.

The next steps towards attaining the objectives of Vision 2030 will be guided by the interventions that the Second Republic is going to undertake through the National Development Strategy 1: 2021-2025 (NDS1), as we march towards achieving an upper middle-income society by 2030. The NDS1 is our first 5-year Medium Term Plan aimed at realising the country’s Vision 2030, while simultaneously addressing the global aspirations of the Sustainable Development Goals (SDGs) and Africa Agenda 2063.

The NDS1 is premised on four critical guiding principles. The first is a recognition that bold and transformative measures are required to underpin the drive towards the attainment of our Vision 2030. Slow and incremental change will not deliver the transformation that the people of Zimbabwe deserve.

Secondly, it is clear that, while we continue to make headway with our international re-engagement efforts, which in time will yield positive results, we must intensify our efforts to generate growth through intentional mobilisation of domestic growth vectors. To this end, the NDS1 must attend to the development and capacitation of key national institutions, which will create the enabling environment critical for transformative economic growth. Further, let me re-emphasise that Zimbabwe is open for business to all investors, foreign and domestic, including Zimbabweans in the Diaspora.

Thirdly, the NDS1 must deliberately leverage Zimbabwe’s competitive advantages particularly with regards to the configuration of our natural resource endowment, our excellent ecological endowment and our skills base.
Finally, for transformative and inclusive growth to bring benefits to all Zimbabweans in a fair, transparent and just manner, we must deepen our commitment to the tenets of good corporate governance as enunciated in our Vision 2030 document.

I call upon all the people of Zimbabwe, including the private sector, civic society and co-operating partners, to work together through this Strategy, for us to realise our Vision 2030 goals.

I therefore commend the National Development Strategy 1 for January 2021-December 2025 to the people of Zimbabwe.

Together, harnessing the collective energies of all Zimbabweans, from across the length and breadth of our uniquely blessed country, we will achieve Vision 2030 for an **Empowered and Prosperous Upper Middle-Income Society by 2030**.

I thank you.

Emmerson Dambudzo Mnangagwa
President of the Republic of Zimbabwe

16 November 2020
PREFACE

The end of the Transitional Stabilisation Programme (TSP) marks the beginning of a new journey as we march towards the realisation of our Vision 2030 objectives. This journey began when we launched the TSP, in October 2018. Indeed significant progress has been made. Notable achievements include; fiscal consolidation, external sector balance and exchange rate stability.

In our next step, Government has come up with the National Development Strategy 1: 2021-2025 (NDS1). This Strategy is a culmination of an extensive consultative process involving stakeholders at all levels so as to develop consensus and establish a sense of ownership.

It is also important to note that the formulation of the NDS1 has been under constantly changing global scenarios, shaped by geo-political changes, technological changes, market segmentation and climatic shocks. Further, the NDS1 was developed in the face of an unprecedented pandemic in the form of COVID-19.

Given the new normal under COVID-19, which has disrupted economic activities across the globe, particularly tourism and the global travel services industry, we must adapt fast with these changing scenarios as the future pattern of this disease and its full impacts remain uncertain.

The formulation of the NDS1 marks a departure in planning approaches with the full adoption of the Integrated Result Based Management (IRBM) system, complemented by Public Sector Reforms (PSR) through the Whole of Government Approach.

This approach links National Development Plans with National Budgets, as well as Personnel Performance. This means that National Budgets will only support programmes, projects and interventions which contribute to the achievement of National Outcomes and realisation of National Priorities as defined in the NDS1. Further, the National Budget framework will adopt a medium-term budgeting approach in line with the 3-year rolling budget standard, which will be consistent with the National Development Strategy outcomes and targets.

The overarching goal of the NDS1 is to ensure high, accelerated, inclusive and sustainable economic growth as well as socio-economic transformation and development as we move towards an upper middle-income society by 2030. As such, the NDS1 will build on the successes, while addressing challenges met during the TSP. Special emphasis will be on the unfinished and ongoing efforts in the area of macroeconomic stability.
Furthermore, the NDS1 will endeavour to steer the economy onto a growth path to realise an average of 5 percent Gross Domestic Product (GDP) growth rate per annum over the Strategy Period. In pursuing economic growth, we remain alive to the challenges that Zimbabwe continues to face on the external front. To this end, significant emphasis will be placed on mobilising internal sources of growth even as we continue to engage and re-engage the international community and reach out to Zimbabweans in the diaspora. In order to give impetus to this Strategy, the NDS1 will intentionally commit resources towards building and capacitating key national institutions that play a critical role in providing the enabling environment for private sector investment to thrive.

As we implement the NDS1, Government will move with the Sustainable Development Goals (SDGs) theme of “leaving no-one and no place behind.” In this regard, technical and financial support from both the Private Sector and Development Partners is welcome. To ensure smooth and effective implementation of the NDS1, an all inclusive coordination and implementation architecture, supported by comprehensive communication strategy for the NDS1 will be developed.

The Government of the Republic of Zimbabwe would like to express its profound gratitude to the following: UN family, represented by the Resident Coordinator, The World Bank Country Office, African Development Bank, Confederation of Zimbabwe Industries, Zimbabwe National Chamber of Commerce, Miners Associations, Farmers Organisations, Tourism Associations, Civil Society, Represented by NANGO, Women Organisations, Bankers Association of Zimbabwe and Labour Unions, among others. We anticipate the partnerships to continue during the implementation time frame of the NDS1.

Prof. Mthuli Ncube
Minister of Finance & Economic Development
16 November 2020
THE NDS1 EXECUTIVE SUMMARY

1. Zimbabwe has implemented several economic blueprints aimed at promoting sustainable economic growth, employment and new wealth creation, national development and poverty alleviation. However, the development results achieved have been sub-optimal and insufficient to spur the economy to expected levels of sustainable economic development due to both exogenous and endogenous factors.

2. The Vision 2030 was launched in September 2018 to chart Zimbabwe’s new development trajectory to achieve an Upper Middle Income Society by 2030, for an empowered and prosperous Zimbabwe. The Vision reflects the collective aspirations and determination of the people of Zimbabwe to achieve and sustain economic growth, broad based transformation, while conferring equal opportunities for all.

3. The National Development Strategy 1: 2021-2025 (NDS1) is the successor to TSP and is the first 5-year Medium Term Plan aimed at realising the country’s Vision 2030. The Strategy will build on the success of the TSP, notably entrenching macroeconomic stability, necessary for economic recovery and growth, and conferring new opportunities for wealth creation, innovation and enterprise development.

4. The NDS1 is the culmination of extensive and structured stakeholder consultations through fourteen (14) Thematic Working Groups, and the consolidation of the policy proposals and strategies arising from extensive, across the board stakeholder consultations.

5. The objectives of The NDS1 are to:
   i. Strengthen macroeconomic stability, characterised by low and stable inflation, as well as exchange rate stability;
ii. Achieve and sustain inclusive and equitable Real GDP growth;
iii. Promoting new enterprise development, employment and job creation;
iv. Strengthen Social Infrastructure and Social Safety nets;
v. Ensure sustainable environmental protection and resilience;
vi. Promote Good Governance and Corporate Social investment; and
vii. To modernise the economy through use of ICT and digital technology.

6. Through the broad based stakeholder consultative process, the NDS1 National Priorities were identified as: Economic Growth and Stability; Food Security and Nutrition; Governance; Moving the Economy up the Value Chain & Structural Transformation; Human Capital Development; Environmental Protection; Climate Resilience and Natural Resource Management; Housing Delivery; ICT and Digital Economy; Health and Well-being; Transport, Infrastructure & Utilities; Image building and International Engagement and Re-engagement; Social Protection; Youth, Sport and Culture and Devolution.

7. The NDS1 is underpinned by the Integrated Results Based Management (IRBM) system which inculcates a culture of high performance, quality service delivery, measurement, goal clarity, continuous improvement and accountability across the public sector.

8. The successful implementation of the NDS1 is preconditioned on a number of key success factors. Among them is the pace of global recovery from the COVID-19 pandemic, local economic recovery on the back of firming international mineral prices and agriculture recovery.

9. On the domestic front, consolidating macroeconomic stability during NDS1 period will be critical in creating certainty and confidence in the economy by anchoring exchange rate and inflation. During the NDS1, priority will be to deepen fiscal and
monetary coordination, ending all quasi fiscal activities, curbing all unbudgeted expenditures and strengthening the foreign exchange system.

10. The successful implementation of the NDS1 requires public sector transformation which comprehensively addresses all aspects of the existing silo mentality while building collective accountability. In this regard, Government will upscale the change management strategy and fully implement the Whole of Government Approach.

11. During the implementation of the NDS1, cross cutting issues such as gender, youth, people living with disabilities, arts and creative industry, environment and information communication technology will be mainstreamed in all Thematic Working Programmes in order to ensure that the aspirations are realised within the context of the NDS1.

THE NDS1 MACROECONOMIC FRAMEWORK

12. The economy experienced sustained recession in 2019 and 2020, with GDP estimated to have contracted by -6% and -4.1% respectively. Accounting for the economic contraction, were significant output losses in agriculture, mining, manufacturing, tourism and electricity generation. The decline in output reflects mainly the negative effects of prolonged drought episodes, Cyclone Idai experienced in March 2019 and the impact of the COVID-19 pandemic.

13. The 2021 -2025 Macroeconomic Framework is premised on the adoption and swift implementation of bold policies and programmes aimed at achieving economic transformation through the creation of a thriving private-sector led, open and competitive economy, with sound macroeconomic policies anchored on fiscal discipline, monetary and financial sector stability, a business friendly environment which promotes both foreign and domestic investment.
14. The macroeconomic objectives for the five-year period of the NDS1 are:

- Achieve an average annual real GDP growth rate of above 5%;
- Maintain fiscal deficits averaging not more than 3% of GDP in line with SADC targets;
- Achieve and maintain single digit inflation;
- Increase international reserves to at least 6 months import cover by 2025;
- Establish a market determined and competitive foreign exchange rate regime;
- Maintain public and publicly guaranteed external and domestic debt to GDP at below 70% of GDP;
- Maintain a current account balance of not more than -3% of GDP;
- Create at least 760,000 formal jobs over the five-year NDS1 period;
- Improve infrastructure development and investment in energy, water, sanitation, roads, health, education, housing and social amenities; and
- Accelerate value addition and beneficiation of agriculture and mining production.

15. Average GDP growth rates of above 5% over the NDS1 period (2021-2025), will be a pre-requisite for the country to reach upper middle income status by 2030.

16. Increases in agriculture production and productivity, especially by smallholder farmers will ensure food and nutrition security, enhanced income, increased opportunities for value addition and the development of agro-business value chains.

17. Enhancing investment in mining towards exploration, beneficiation and value addition of minerals including levelling the field to accommodate small scale miners will create more jobs and increase foreign currency earnings for the country.

18. Maintaining prudent fiscal management, guided by the principle of living within our means will be key in ensuring macroeconomic stability and building the internal resilience of the economy.
19. The NDS1 seeks to consolidate the gains made so far on the monetary policy front, with major outcomes being currency and price stability. The following will be the Monetary Policy targets:
   - Reduce inflation to single digit of between 3% - 7% by 2025 in line with the SADC Macroeconomic Convergence Target;
   - Align reserve money growth to levels consistent with low and stable inflation as well as exchange rate stability; and
   - Eliminate quasi-fiscal operations.

20. The NDS1 will sustain a market clearing foreign exchange rate regime and sequence measures to ensure the Zimbabwe dollar as the dominant legal tender by 2025.

21. During the NDS1 period, the foreign exchange system will be strengthened and this will be complemented by building international foreign exchange reserves of at least 6 months of import cover.

22. In order to realise improved financial sector stability, the RBZ will strengthen the prudential supervisory policy framework, implement Financial Sustainability Standards, ensure banks maintain adequate capital levels, fully implement the Basel III Accord, and ensure an efficient National Payments System.

23. To foster operational synergies and strengthen operational efficiency, Treasury and the RBZ will establish a liquidity management committee responsible for liquidity and cash-flow management; synchronisation of liquidity injections and withdrawals; enhancing information sharing and the two institutions.

24. In light of the high concentration of primary commodity exports, Government, during the NDS1 period, will focus on value addition and beneficiation. Investment in value addition will transform Zimbabwe’s economic structure from one highly
dependent on the export of minerals and agricultural raw materials to an economy trading high value processed goods.

25. External debt arrears clearance will be considered in line with progress made with Government’s engagement and re-engagement with the international community. The successful negotiation of a debt and arrears clearance programme with external creditors will open new lines of credit for the economy.

26. In order to reduce fiscal risks emanating from State Owned Enterprises (SOEs), Government will, expedite SOEs reforms targeting commercialisation, improved governance, provision of services at viable prices, full or partial privatisation, outright disposals and amalgamation of some of the SOEs into existing Government Departments.

ECONOMIC GROWTH AND STABILITY

27. Economic growth and stability is a prerequisite for sustainable development, which contributes to improved livelihoods for all. Sustained economic growth creates certainty and confidence in the economy. The overall success of the NDS1 is, therefore, premised on realising increased economic growth and stability. Key priority areas under Economic Growth and Stability are:-
   i. Macroeconomic stability;
   ii. Stable monetary policy and financial stability; and
   iii. Sustained, Inclusive Growth.

28. Production and productivity in key locomotive (anchor) sectors: agriculture, mining, manufacturing, and tourism will be critical in achieving the overall goal of sustainable economic growth. This will catalyse economic growth in other sectors of the economy, including the Micro, Small and Medium Enterprises (MSMEs) sectors and the semi-formal activities that are ordinarily at the margins of the economy.
29. During the NDS1, efficient infrastructure delivery will be key in the realisation of National Priorities and overall socio-economic development. This will involve restoring basic infrastructure services including expansion in critical areas mainly targeting key sectors of energy, transport, water and sanitation, Information and Communication Technology and Housing.

30. To create new and accelerate the domestication of existing value chains, during the NDS1, the country’s macroeconomic: fiscal, monetary and trade policy environment as well as incentive and regulatory frameworks, will be revamped to promote diversification and competitiveness.

31. Human Capital Development and Innovation will drive the NDS1 and the country’s prospects towards Vision 2030. The focus will be on creating a knowledge driven economy for sustained growth, innovation for industrialisation and modernisation of Zimbabwe through reconfiguration of the education system with a strong emphasis on Science, Technology, Engineering, Arts and Mathematics (STEAM).

32. Given the huge housing backlog and the inadequacies of attendant infrastructure, Government will, through the NDS1, prioritise citizens’ access to affordable and quality settlements in urban and rural areas. Focus will be on construction of new housing units and upgrading of informal settlements equipped with the necessary basic and social services infrastructure and amenities in order to improve the quality of life.
HEALTH AND WELL BEING

33. Health is a fundamental human right in terms of the Constitution of Zimbabwe. Improved health is central to human happiness, well-being and economic progress, as healthy populations live longer, are more productive and accumulate more savings.

34. The overall outcome of the Health and Wellbeing priority area during the NDS1 Period is to improve quality of life, increase life expectancy at birth, benefiting from underlying strengths within the Health System that include; skilled, knowledgeable and professional health workforce, firm foundations of Primary Health and Hospital Care and improved quality of Public Health Expenditure.

CROSS CUTTING ISSUES

35. The following cross cutting issues have been mainstreamed throughout the NDS1 Period: Youth and Gender; Financial Inclusion; Social Protection; Poverty Alleviation and Safety Nets; Environmental Protection; Climate Resilience and Natural Resources Management; Institutional Alignment, Governance and Property Rights.

DEVOLUTION AND DECENTRALISATION

36. During the NDS1 period Government through Devolution and Decentralisation will provide organisational structures that allow citizens to participate in development planning, consistent with the tenets enshrined in the Constitution of Zimbabwe that compel devolution of powers and responsibilities to competent Provincial/ Metropolitan Councils and Local Authorities, whilst upholding the unitary architecture of the Zimbabwean State.
IMAGE BUILDING, INTERNATIONAL ENGAGEMENT AND RE-ENGAGEMENT

37. The engagement and re-engagement drive in support of a shift from traditional to economic diplomacy will improve the country’s image, strengthen relations with the international community and will boost trade and investment as we march towards Vision 2030.

NDS1 FINANCING

38. Possible financing options underpinning the NDS1 include: fiscal revenues, loans, grants, public entities own resources and private sector resources including, Public Private Partnerships (PPPs), Foreign Direct Investment and Diaspora investments. Further, a compendium of duly costed, high impact programmes and projects, with clear sources of funding will be implemented during the Strategy Period as will be outlined in the NDS1 Programmes and Projects Investment Plan.

MONITORING AND EVALUATION

39. Monitoring and Evaluation will commence at the outset of the Strategy Period and will be tracked through an e-enabled Information Management System. The M&E will focus on tracking progress towards results (goals, desired outcomes and outputs), under the NDS1.
<table>
<thead>
<tr>
<th>ACRONYMS</th>
<th>Description</th>
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<tbody>
<tr>
<td>AFSTS</td>
<td>Agriculture and Food Systems Transformation Strategy</td>
</tr>
<tr>
<td>AIDS</td>
<td>Acquired Immunodeficiency Syndrome</td>
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<tr>
<td>AKIS</td>
<td>Agricultural Knowledge and Innovation Services</td>
</tr>
<tr>
<td>APIS</td>
<td>Active Pharmaceutical Ingredients</td>
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<tr>
<td>ASM</td>
<td>Artisanal and Small Scale Miners</td>
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<td>BASA</td>
<td>Bilateral Air Service Agreements</td>
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<tr>
<td>BIPPA</td>
<td>Bilateral Investment Promotion and Protection Agreements</td>
</tr>
<tr>
<td>BMR</td>
<td>Base Metal Refinery</td>
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<tr>
<td>BOOT</td>
<td>Built Own Operate and Transfer</td>
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<tr>
<td>BOT</td>
<td>Built Operate and Transfer</td>
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<tr>
<td>CAMPFIRE</td>
<td>Communal Areas Management Programme for Indigenous Resources</td>
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<tr>
<td>CBM</td>
<td>Coalbed Methane</td>
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<tr>
<td>CBNRM</td>
<td>Community Based Natural Resources Management</td>
</tr>
<tr>
<td>CCIs</td>
<td>Cultural and Creative Industries</td>
</tr>
<tr>
<td>CERID</td>
<td>Centres for Educational Research, Innovation and Development</td>
</tr>
<tr>
<td>CKD</td>
<td>Completely Knocked Down</td>
</tr>
<tr>
<td>COMESA</td>
<td>Common Market for Eastern and Southern Africa</td>
</tr>
<tr>
<td>COVID-19</td>
<td>Corona Virus Disease-2019</td>
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<tr>
<td>CPI</td>
<td>Consumer Price Index</td>
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<tr>
<td>CSC</td>
<td>Cold Storage Commission</td>
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<tr>
<td>CSOs</td>
<td>Civil Society Organisations</td>
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<tr>
<td>DAH</td>
<td>Development Assistance for Health</td>
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<tr>
<td>ECD</td>
<td>Early Childhood Development</td>
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<tr>
<td>e-LMIS</td>
<td>Electronic Logistics Management Information System</td>
</tr>
<tr>
<td>EPOs</td>
<td>Exclusive Prospecting Orders</td>
</tr>
<tr>
<td>ESAP</td>
<td>Economic Structural Adjustment Programme</td>
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<tr>
<td>FFYNDP</td>
<td>First Five Year National Development Plan</td>
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<tr>
<td>FTLRP</td>
<td>Fast Track Land Reform Programme</td>
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<tr>
<td>FBDGs</td>
<td>Food Based Dietary Guidelines</td>
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<tr>
<td>GDP</td>
<td>Gross Domestic Product</td>
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<tr>
<td>GIR</td>
<td>Gross Intake Rates</td>
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<tr>
<td>GIS</td>
<td>Geographic Information System</td>
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<tr>
<td>GISP</td>
<td>Government Internet Services Provider</td>
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<tr>
<td>GMB</td>
<td>Grain Marketing Board</td>
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<tr>
<td>HEXCO</td>
<td>Higher Education Examination Council</td>
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</tbody>
</table>
HGF  Housing Guarantee Fund
HIV  Human Immunodeficiency Virus
HMIS  Health Management Information System
HRGP  Horticulture Recovery and Growth Plan
HSB  Health Service Board
HTEIs  Higher and Tertiary Education Institutes
IATA  International Air Transport Association
ICRC  Independent Complaints Review Commission
ICTs  Information and Communication Technologies
IRBM  Integrated Results Based Management
ISMO  Independent System and Market Operator
JSC  Judicial Service Commission
KPIs  Key Performance Indicators
KRAs  Key Result Areas
KSF  Key Success Factor
M & E  Monitoring and Evaluation
MEPF  Macro- Economic Policy Framework
MERP  Zimbabwe Millennium Economic Recovery Programme
MDAs  Ministries, Departments and Agencies
MfDR  Management for Development Results
MICE  Meetings Incentive Conferences and Exhibition
MILF  Mining Industry Loan Fund
MIS  Management Information Systems
MMCZ  Minerals Marketing Corporation of Zimbabwe
MMR  Maternal Mortality Ratio
MSMEs  Micro, Small and Medium Enterprises
MTP  Medium Term Plan
MW  Megawatts
NAMACO  National Manpower Advisory Council
NATPHARM  National Pharmaceutical Company
NCDs  Non-Communicable Diseases
NDS1  National Development Strategy 1
NEDPP  National Economic Development Priority Programme
NERP  National Economic Revival Programme
NP  National Priority
NPRC  National Peace and Reconciliation Commission
NRZ  National Railways of Zimbabwe
NSPPF  National Social Protection Policy Framework
NSPSC  National Social Protection Steering Committee
NSSA  National Social Security Authority
NTD  Neural Tube Defects
OPC  Office of the President and Cabinet
PBB  Programme Based Budgeting
PFMS  Public Financial Management System
PGMs  Platinum Group Metals
PPG  Public and Publicly Guaranteed
PPPs  Public–Private Partnerships
PPS  Personnel Performance System
PRAZ  Procurement Regulatory Authority of Zimbabwe
PSR  Public Sector Reforms
RAM  Rural Assembly Markets
RBZ  Reserve Bank of Zimbabwe
RISDP  Regional Indicative Strategic Development Plan
ROOT  Repair Own Operate and Transfer
SACCOS  Savings and Credit Cooperatives
SADC  Southern African Development Community
SDF  Standards Development Fund
SDGs  Sustainable Development Goals
SEPs  State Enterprises and Parastatals
SGR  Strategic Grain Reserve
SKD  Semi Knocked Down
SLA  Service Level Agreements
SMEDCO  Small and Medium Enterprises Development Corporation
SMEs  Small to Medium Enterprises
SMP  Staff Monitored Programme
SOEs  State Owned Enterprises
STEAM  Science, Technology, Engineering, Arts and Mathematics
STEM  Science, Technology, Engineering and Mathematics
STERP  Short Term Emergency Recovery Programme
SWGAs  Sector Working Groups
TBs  Treasury Bills
ThWGs  Thematic Working Groups
TNDP  Transitional National Development Plan
TNF  Tripartite Negotiating Forum
TSA  Tourism Satellite Account
TSP  Transitional Stabilisation Programme
TVET  Technical Vocational Education and Training
<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>U5MR</td>
<td>Under-5 Mortality Rate</td>
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<tr>
<td>UPR</td>
<td>Universal Periodic Review</td>
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<tr>
<td>WASH</td>
<td>Water, Sanitation and Hygiene</td>
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<tr>
<td>WoGPMS</td>
<td>Whole of Government Performance Management System</td>
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<tr>
<td>ZAMCO</td>
<td>Zimbabwe Asset Management Corporation</td>
</tr>
<tr>
<td>ZCHPC</td>
<td>Zimbabwe Centre for High Performance Computing</td>
</tr>
<tr>
<td>ZEDF</td>
<td>Zimbabwe Education Development Fund</td>
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<tr>
<td>ZETDC</td>
<td>Zimbabwe Electricity Transmission and Distribution Company</td>
</tr>
<tr>
<td>ZHRC</td>
<td>Zimbabwe Human Rights Commission</td>
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<tr>
<td>ZIDA</td>
<td>Zimbabwe Investment and Development Agency</td>
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<tr>
<td>ZEDS</td>
<td>Zimbabwe Economic Development Strategy</td>
</tr>
<tr>
<td>ZIMCHE</td>
<td>Zimbabwe Council for Higher Education</td>
</tr>
<tr>
<td>ZIMDEF</td>
<td>Zimbabwe Manpower Development Fund</td>
</tr>
<tr>
<td>ZIMPREST</td>
<td>Zimbabwe Programme for Economic and Social Transformation</td>
</tr>
<tr>
<td>ZIMRA</td>
<td>Zimbabwe Revenue Authority</td>
</tr>
<tr>
<td>ZIMASSET</td>
<td>Zimbabwe Agenda for Sustainable Socio-Economic Transformation</td>
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<tr>
<td>ZIMSEC</td>
<td>Zimbabwe School Examinations Council</td>
</tr>
<tr>
<td>ZINGSA</td>
<td>Zimbabwe National Geospatial and Space Agency</td>
</tr>
<tr>
<td>ZINSA</td>
<td>Zimbabwe Indigenous National Security Association</td>
</tr>
<tr>
<td>ZINWA</td>
<td>Zimbabwe National Water Authority</td>
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<tr>
<td>ZISCO</td>
<td>Zimbabwe Iron and Steel Company</td>
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</tbody>
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CHAPTER 1

CONTEXT OF THE NATIONAL DEVELOPMENT STRATEGY 1 (2021-2025)

Introduction

40. Since independence in 1980, Zimbabwe has implemented several economic blueprints aimed at promoting sustainable economic growth, development and poverty alleviation. Through the implementation of these blueprints, Zimbabwe managed to transform itself to the current levels of development.

41. However, the development results achieved have not been strong enough to spur the economy to expected levels of sustainable economic development due to both exogenous and endogenous factors.

42. Figure 1 below shows Zimbabwe’s economic blueprints and the corresponding growth rates from 1980 to 2020.

Figure 1: National Economic Blueprints and Real GDP growth rates: 1980-2020

Source: Ministry of Finance and Economic Development, 2020
Policy Thrust under the Second Republic

43. The ushering in of the New Dispensation in November 2017 saw the launch of Vision 2030 to chart Zimbabwe’s new development trajectory. The Vision reflects the collective aspirations and determination of the people of Zimbabwe to achieve a Prosperous and Empowered Upper Middle Income Society by 2030.

44. As spelt out in Vision 2030, achieving a Prosperous and Empowered Upper Middle Income Society will depend on the formulation and implementation of bold and robust policies as well as other interventions that Government will undertake through Short and Medium-Term National Development Plans. Figure 2 below shows the road map to the realisation of the aspirations of Vision 2030.

Figure 2: Development Framework for Vision 2030

Source: Ministry of Finance and Economic Development, 2020
**Transitional Stabilisation Programme (TSP)**

45. The TSP (October 2018-December 2020) was implemented as a first step of a three-phase process to attain the country’s Vision 2030 outcomes.

46. The TSP sought to strengthen key priorities that form the foundation for the implementation of Medium-Term Plans. The TSP was aimed at stabilising the macro-economy and the financial sector, introducing necessary policy and institutional reforms to transform the economy to a private sector led economy, as well as launching quick-wins to stimulate growth.

47. Further, the TSP was crafted to deal with distortions and challenges that would retard growth of the economy in the long run. These include persistent and unsustainable budget deficits, inflationary pressures, uncontrolled domestic borrowing and unsustainable debt levels.

48. These distortions and challenges hindered Government efforts to come up with a long-term development strategy, since sustained macro-economic stability is a prerequisite to long term National Development Planning and implementation.

49. Significant progress was made in the implementation of the TSP across various Pillars. These include fiscal consolidation, restoration of monetary policy, stabilisation of the exchange rate, the undertaking of governance and institutional reforms, entrenched engagement and re-engagement with the international community, facilitation of investment and infrastructure development.

50. Fiscal consolidation during the TSP was achieved through expenditure containment measures as well as limiting recourse to the Central Bank overdraft. During the TSP period, Treasury Bills (TBs) were only issued within the framework of the Budget.

51. In addition, Government managed to contain the Public Wage Bill to below 50% of Government revenues.
52. Additionally, the Zimbabwean dollar was re-introduced. Exchange rate stabilisation was also successfully achieved through the implementation of the foreign currency auction system.

53. Several strides were made in transforming the governance ecosystem to ensure that the country’s institutions, systems and practices conform to the provisions of the new Constitution. In order to guarantee constitutional provisions, including fundamental rights, freedoms and responsibilities under the TSP, Government aligned more than 75% of the laws to the Constitution. This was also further complimented by implementation of various public sector reform measures to enhance institutional and individual performance towards provision of quality services to the citizenry.

54. Under the Infrastructure and Utilities pillar, a number of roads and other related infrastructure were constructed throughout the country. Besides the road networks, notable achievements were recorded in rail, water and sanitation, information communication technology, aerospace, energy and power, irrigation, housing and office accommodation infrastructure.

55. In Education, a total of 153 new educational institutions were registered during the TSP period. Government, through Private Public Partnerships (PPPs), completed the construction of new infrastructure at 8 Universities, 8 Polytechnics and 4 Teachers Colleges. These include: Gwanda State University, Manicaland State University of Applied Sciences, Marondera University of Agriculture, Lupane State University, Madziwa Teacher’s College, Mkoba Teacher’s College, Masvingo Technical College, Joshua Mqabuko Polytechnic College and Hwange Teacher’s College, among others.

56. Notwithstanding these achievements, the TSP faced a number of challenges during its implementation. These include among others, high inflationary pressures, exchange rate volatility, continued illegal sanctions against the country, and exogenous shocks like droughts, Cyclone Idai and the COVID-19 pandemic. These
shocks affected the entire economy with the greatest impact being on agricultural production and electricity generation, with extended effects also felt on other sectors of the economy.

57. Consequently, the economy was left in a weak position during the better part of the TSP period, hence affecting a number of planned targets.

**Thrust of the National Development Strategy 1: 2021-2025**

58. The National Development Strategy 1: 2021-2025 (NDS1) is the successor to the TSP and is the first 5-year Medium Term Plan aimed at realising the country’s Vision 2030. The Strategy will build on the successes realised by the TSP as well as addressing its challenges, particularly the unfinished efforts in the area of macroeconomic stability and growth.

59. The NDS1 outlines the strategies, policies, legal and institutional reforms and the programmes and projects that will be implemented over the five-year period, 2021-2025, to achieve accelerated, high, inclusive, broad based and sustainable economic growth as well as socio-economic transformation and development.

60. Through the broad based stakeholder consultative process, the following National Priorities were identified:-
- Economic Growth and Stability;
- Food and Nutrition Security;
- Governance;
- Moving the Economy up the Value Chain & Structural Transformation;
- Human Capital Development;
- Environmental Protection, Climate Resilience and Natural Resource Management;
- Housing Delivery;
- Digital Economy;
Health and Well-being;
Infrastructure & Utilities;
Image Building and International Engagement and Re-engagement;
Social Protection;
Youth, Sport and Culture; and
Devolution.

61. The National Priorities were crafted taking into consideration the TSP Mid-Term Review, Vision 2030, Sustainable Development Goals (SDGs), Africa Agenda 2063, SADC Regional Indicative Strategic Development Plan (RISDP) as well as provincial and district profiles.

62. Implementation of programmes, policies and interventions to realise these priorities will transform the Zimbabwean economy from a natural resource economy to a knowledge driven economy. This will also move the country from a lower middle income society towards an upper middle income society.

63. Figure 3 below shows the NDS1 pathways of change towards Vision 2030.
64. In order to enhance coordination and implementation of programmes and projects, central to the realisation of the NDS1 targeted results, monitoring and evaluation of the Strategy will be through Thematic Working Groups (ThWGs) as part of the consultative process.

65. Table 1 below shows the relationship between National Priorities, Vision 2030 and the SDGs. The SDGs and Africa Agenda 2063 have a 70% convergence, therefore
by aligning the SDGs to the National Priorities, 70% of Agenda 2063 issues will be mainstreamed into NDS1.

Table 1: Relationship between Vision 2030, SDGs and National Priorities

<table>
<thead>
<tr>
<th>Vision 2030 Pillar</th>
<th>SDG</th>
<th>National Priority</th>
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<tbody>
<tr>
<td>Inclusive Growth</td>
<td>SDG 2,13</td>
<td>Food and Nutrition Security</td>
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<tr>
<td></td>
<td>SDG 6, 7, 9, 11</td>
<td>Infrastructure &amp; Utilities</td>
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<td></td>
<td>SDG 8, 9, 12</td>
<td>Moving the Economy up the Value Chain &amp; Structural Transformation</td>
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<td>Governance</td>
<td>SDG 10, 16</td>
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<td>SDG 11, 12, 13, 14, 15</td>
<td>Environmental Protection, Climate Resilience &amp; Natural Resource Management</td>
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<td>Infrastructure and Utilities</td>
<td>SDG 9, 11</td>
<td>Housing Delivery</td>
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<tr>
<td>Social Development</td>
<td>SDG 3, 4, 6</td>
<td>Health &amp; Well-being</td>
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<td></td>
<td>SDG 4, 7, 8, 11</td>
<td>Human Capital Development</td>
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<td></td>
<td>SDG 10, 11</td>
<td>Social Protection</td>
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<td></td>
<td>SDG 10, 11</td>
<td>Devolution</td>
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<td>Macroeconomic Stability &amp; Financial Re-engagement</td>
<td>SDG 10, 17</td>
<td>Image Building &amp; International Re-engagement</td>
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<td></td>
<td>SDG 8, 9, 10</td>
<td>Economic Growth &amp; Stability</td>
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<tr>
<td>Cross-cutting</td>
<td>SDG 11</td>
<td>Youth, Sport &amp; Culture</td>
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<td></td>
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<td>Digital Economy</td>
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</table>

Source: Ministry of Finance and Economic Development, 2020

Managing for Development Results Under NDS 1

66. The attainment of the targets of Vision 2030 from the current baseline requires the country to re-invigorate and re-orient itself towards a transformative agenda of Managing for Development Results (MfDR). MfDR emphasises on achievement of results that positively impact on the economy and people’s livelihoods. To this end,
the NDS1 is underpinned by the IRBM system. IRBM inculcates a culture of high performance, quality service delivery, measurement, goal clarity, continuous improvement and accountability across the public sector.

67. In this regard, Government, for the first time in the history of crafting national blueprints, designed National and Sectoral Results Frameworks to systematically guide the formulation and implementation process of the NDS1. The frameworks allowed Government to define National Priorities, Key Result Areas, National Outcomes, Key Performance Indicators, and Targets among other parameters. This framework was replicated at Sectoral Level in order to allow for creation of strong linkages with Ministries, Departments and Agencies (MDAs), where the implementation of Programmes, Projects and other interventions take place.

68. The Programmes, Projects and other interventions, which are key components of this Strategy, as outlined in all the following Chapters of the blueprint, will be supported in the National Budget through the Programme Based Budgeting (PBB) System, which Government has adopted for all MDAs. This process will fully integrate National Planning and National Budgeting in line with IRBM principles as the country progresses towards Vision 2030, as shown in Figure 4 below.
69. The National and Sectoral Development Results Frameworks allows for horizontal and vertical linkages, hence improving efficacy in programming. Broadly, the National Priorities are aimed at contributing towards economic growth and development, reducing poverty and inequality and transforming institutions to enhance public sector efficiency and effective service delivery.

70. By implementing the IRBM system, Government is aiming to re-invigorate and re-engineer systems and processes for better performance and delivery of quality services. This will be enabled through linkage of planning, budgeting, implementation, monitoring and evaluation. The Managing for Development Results thrust will strengthen the Whole of Government Approach (WoGA), which emphasises joint programming and inclusivity.

71. In this regard, Government has also developed a robust Monitoring and Evaluation system that will anchor the NDS1. Under the SMART Zimbabwe 2030, which is a
broad strategy that includes the e-Government Programme, a Whole of Government Performance Management Solution (WoGPMS) will be used to monitor all programmes and projects implemented by the Government on a real time bases during the NDS1. This Strategy, therefore, requires acceleration and intensification of the implementation of ICT systems in both the public and private sectors.

72. These institutional and systems reform measures will be accompanied by a strengthening of the Personnel Performance System (PPS) in order to change the mind set of public officials and imbue them with a market facing culture characterised by servant leadership, patriotism and loyalty. Government will, therefore, put in place performance management instruments including the introduction of Performance Contracts for Heads of Ministries, Heads of State Enterprises and Parastatals, as well as Heads of Local Authorities.

73. All public entities will develop their strategic plans in line with the IRBM approach and being guided by the NDS1.

74. The implementation of the NDS1 will require a mind-set change and a new way of thinking and doing business. This mind-set change will require public officials and the private sector to think, act and produce desired outcomes and outputs timeously.

75. The change management strategy of Systems and Whole of Government Approach, which is being championed by the Tripartite, namely Office of the President and Cabinet (OPC), Public Service Commission (PSC) and Ministry of Finance and Economic Development, will anchor the NDS1.

**NDS1 Key Success Factors**

76. The successful implementation of NDS1 is preconditioned on a number of key success factors. Among them is the pace of the global economy recovery from the
COVID-19 pandemic. The recovery will have implications on domestic socio-economic progress.

77. On the domestic front, consolidating macroeconomic stability during the NDS1 Period will be critical for enhancing certainty and confidence in the economy by anchoring exchange rate and inflation. During the Strategy Period, priority will be to strengthen fiscal and monetary coordination, ending all quasi fiscal activities, curbing of all unbudgeted expenditures and deepening the market based foreign exchange rate system.

78. Further, successful implementation of the NDS1 prioritised programmes and projects will be premised on the predictability of the Budget. In this regard, the NDS1 will prioritise timely availing of funds to support identified programmes and projects in the Strategy, which will be implemented to deliver the desired outcomes.

79. Financial resources without adequate, relevant, skilled and motivated human resources will not deliver the desired outcomes of the NDS1. In this regard, during the NDS1, priority will be to ensure timeous filling of posts in the Public Service with appropriate skills mix and regular review of conditions of service.

80. The robust economic growth and transformative thrust of moving up the value chain during the NDS1 Period is premised on availability of efficient key enablers such as energy, transport and water. Moving the economy up the value chain and domesticating these value chains will also depend on the availability of throughput from primary sectors such as agriculture and mining. Priority under the NDS1 will be to increase investment in new infrastructure as well as rehabilitation and upgrading of existing infrastructure. Focus will also be on increasing production and productivity through resolving bottlenecks such as the land tenure in agriculture, legislative gaps in mining and operationalising the Productivity Centre.
81. Effective implementation of programmes and projects is also dependent on the doing business environment. Swift implementation of ease of doing business reforms, strengthening of property rights, upholding the rule of law and combating corruption will be the key tenets of the NDS1.

82. The successful implementation of the NDS1 requires public sector transformation that addresses and deals comprehensively with aspects of silo mentality and lack of collective accountability. In this regard, Government will upscale the change management strategy and fully implement the Whole of Government Approach.

**NDS1 Cross Cutting Issues**

83. During the implementation of the NDS1, cross cutting issues such as gender, youth, persons living with disabilities, employment creation, environment and information communication technology, will be mainstreamed in all Thematic Working Group Programmes in order to ensure that aspirations of these groups are realised within the context of the NDS1.
CHAPTER 2

NDS1 MACROECONOMIC FRAMEWORK

Recent Economic Developments

84. The economy experienced sustained recession in 2019 and 2020, with GDP estimated to have contracted by -6% and -4.1% respectively. Accounting for the economic contraction, were significant output losses in agriculture, mining, manufacturing, tourism and electricity generation. The decline in output reflects mainly the negative effects of prolonged drought episodes, Cyclone Idai experienced in March 2019 and the impact of the COVID-19 pandemic.

85. The slowdown in economic activity was also driven by macroeconomic instability characterised by high inflation and exchange rate volatility against the background of excessive monetary expansion. In addition, foreign currency and electricity shortages negatively affected the productive sectors of the economy. Annual headline inflation rose from single digit levels in 2018, to reach 837.52% in July 2020, before declining to 471.25% by October 2020.

86. Notwithstanding economic contraction, significant progress was, however, witnessed on both the fiscal and external sectors during 2018 and 2019, following implementation of fiscal austerity measures and currency reforms. Fiscal deficits were contained to below 1% of GDP, with the Government sustaining fiscal surpluses during 2019 and through the first half of 2020. Fiscal surpluses were mainly attributed to fiscal consolidation measures adopted in 2018.

87. Current account surpluses, slightly above 6% of GDP, were recorded in 2019 and 2020, reflecting the impact of import compression measures, lower fuel prices, foreign exchange shortages, logistical challenges caused by the Covid-19 pandemic.
and a decline in real disposable incomes. Terms of trade also declined during the same period due to falling commodity prices.

88. As part of measures to address the continued instability and widening of the gap between the official interbank exchange rate and parallel market exchange rates, an open market weekly foreign exchange auction system was introduced by the Reserve Bank of Zimbabwe during 2020.

89. Government also addressed the observed instability emanating from the mobile money platforms, which had become a shadow banking system. In addition, the foreign exchange rate signalling of the dually listed share on the Zimbabwe Stock Exchange was removed. All these factors have worked together to bring stability to the foreign exchange market. This has effectively stemmed the tide of exchange rate depreciation with the weighted average exchange rate of the auction system stabilising at around US$1: ZWL$81.

90. As a result, foreign exchange availability through the formal channels has improved and industry capacity utilisation gains are visible, the green shoots of economic recovery. Correspondingly, price stability is gaining traction for most goods and services in the country on the back of exchange rate stability.

91. Reserve money growth in excess of 300 % in 2019 and 2020 had driven exchange rate instability, underpinning rapid escalation in prices and inflation. Following implementation of tight monetary policy, reserve money growth has declined in tandem and is projected to end the year below 100%; well on course to achieve single digit growth in reserve money by 2025.

92. Public and publicly guaranteed external debt remains high and unsustainable at US$8.1 billion (84% of GDP) as at end December 2019. As much as 74% of the outstanding public and publicly guaranteed debt represents arrears to multilateral
and bilateral creditors, accumulated over the years. As a result, access to external capital remains constrained, due to the accumulation of external debt arrears, perceived high country risk and an unfavourable investment climate. This calls for accelerated engagement and re-engagement efforts with the international community to resolve the country’s unsustainable external debt position.

**Macroeconomic Outlook**

93. The 2021 -2025 Macroeconomic Framework is premised on the adoption and swift implementation of bold strategies, policies and programmes aimed at achieving economic transformation. This will be done through the creation of a thriving private sector led competitive economy, implementation of sound macroeconomic policies anchored on fiscal discipline, monetary and financial sector stability including enhancing an open business friendly environment, which promotes both foreign and domestic investment.

94. Consistent with Vision 2030, the restoration of macroeconomic stability, the eradication of corruption, addressing poverty, improving debt management and rigorous engagement and re-engagement with the international community will be key pillars of the NDS1.

**Macroeconomic Objectives**

95. The specific macroeconomic objectives for the five-year period of the NDS1 are:
   - Achieve an average annual real GDP growth rate of at least 5%;
   - Maintain fiscal deficits averaging not more than 3% of GDP or below in line with the SADC target;
   - Achieve and maintain lower single digit inflation;
   - Increase international reserves to at least 6 months import cover by 2025;
   - Establish a market determined and competitive foreign exchange rate regime;
- Maintain public and publicly guaranteed external and domestic debt to GDP at below 70% of GDP;
- Maintain a current account balance of not more than -3% of GDP;
- Create at least 760,000 formal jobs over the five-year NDS1 period;
- Improve infrastructure development and investment in energy, water, sanitation, roads and housing; and
- Accelerate value addition and beneficiation in agriculture and mining.

96. The NDS1 Macroeconomic Framework projections are broadly underpinned by a gradual recovery in the global economy from the COVID-19 pandemic, which significantly slowed down economic growth, trade and investment during 2020. On the domestic front, the economic outlook is underpinned by a stable macroeconomic environment, characterised by a predictable policy environment and increased investor confidence.

97. To unlock investment which is key in driving sustainable inclusive economic growth during the NDS1 period, Government will prioritise swift implementation of the ease of doing business reforms, enhance respect of property rights, ensure adherence to rule of law, combat corruption and prioritise investment in key infrastructure enablers and essential social services such as health and education.

98. Table 2 summarises the key macroeconomic indicators and projections that underpin the NDS1.
Table 2: NDS1 Macroeconomic Framework (2021-2025)

<table>
<thead>
<tr>
<th>National Accounts (Real Sector)</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>GNI Per Capita Income (US$$)</td>
<td>1159.8</td>
<td>1842.2</td>
<td>2137.1</td>
<td>2712.7</td>
<td>2960.7</td>
<td>3207.3</td>
</tr>
<tr>
<td>Nominal GDP at market prices (Million ZWL$)</td>
<td>1070640.3</td>
<td>2399087.7</td>
<td>3045740.0</td>
<td>3560346.7</td>
<td>4002506.7</td>
<td>4465893.3</td>
</tr>
<tr>
<td>Real GDP Growth (%)</td>
<td>-4.1</td>
<td>7.4</td>
<td>5.5</td>
<td>5.2</td>
<td>5.2</td>
<td>5.0</td>
</tr>
<tr>
<td>Inflation (Annual Average) %</td>
<td>654.9</td>
<td>134.8</td>
<td>23.7</td>
<td>10.5</td>
<td>7.5</td>
<td>5.8</td>
</tr>
<tr>
<td>Formal employment (000)</td>
<td>812.1</td>
<td>963.2</td>
<td>1094.7</td>
<td>1236.6</td>
<td>1398.4</td>
<td>1572.8</td>
</tr>
<tr>
<td>% of People in Extreme Poverty</td>
<td>38.9</td>
<td>24.5</td>
<td>19.2</td>
<td>15.4</td>
<td>12.3</td>
<td>10.1</td>
</tr>
</tbody>
</table>

**Government Accounts**

| Revenues (excluding Retained Revenue) | 173496.3 | 390803.5 | 512434.2 | 632639.5 | 742112.9 | 861930.8 |
| % of GDP                           | 16.2 | 16.3 | 16.8 | 17.8 | 18.5 | 19.3 |
| Expenditures & Net Lending (Million ZWL$) | 178496.0 | 421645.4 | 559598.2 | 693063.1 | 779387.6 | 894137.0 |
| % of GDP                           | 16.7 | 17.6 | 18.4 | 19.5 | 19.5 | 20.0 |
| Recurrent Expenditures             | 120754.0 | 290049.1 | 38745.1 | 485763.5 | 541132.8 | 627371.7 |
| % of GDP                           | 11.3 | 12.1 | 12.7 | 13.6 | 13.5 | 14.0 |
| Employment Costs including Pension | 70499.0 | 172635.0 | 220360.0 | 255107.0 | 298456.0 | 345728.0 |
| % of GDP                           | 6.6 | 7.2 | 7.2 | 7.2 | 7.5 | 7.7 |
| % Total Expenditure                | 39.5 | 40.9 | 39.4 | 36.8 | 38.3 | 38.7 |
| % of Revenue                       | 40.6 | 44.2 | 42.9 | 40.3 | 40.3 | 40.2 |
| Capital Expenditure & Net lending  | 57742.0 | 131596.3 | 172146.5 | 207299.6 | 238254.8 | 266765.2 |
| % of GDP                           | 5.4 | 5.5 | 5.7 | 5.8 | 6.0 | 6.0 |
| Overall Balance                    | -4999.6 | -30693.5 | -46500.8 | -60786.7 | -37970.2 | -33223.9 |
| % of GDP                           | -0.5 | -1.3 | -1.5 | -1.7 | -0.9 | -0.7 |
| Public Debt                        | 1547076.0 | 1972146.6 | 2297004.2 | 2544945.1 | 2744448.7 | 2893157.7 |
| % of GDP                           | 78.4 | 64.5 | 64.8 | 64.5 | 63.6 | 61.5 |

**Balance of Payments Accounts**

| Current Account Balance (million ZWL$) | 67560.8 | 73837.3 | 41646.7 | 14697.1 | -26654.0 | -43123.2 |
| % of GDP                           | 6.3 | 3.1 | 1.4 | 0.4 | -0.7 | -1.0 |
| International Reserves (Months of Import Cover) | 1.0 | 2.0 | 3.5 | 4.5 | 5.0 | 6.0 |

**Deposit Corporations Survey**

| Broad Money (Million ZWL$) | 140072.7 | 201704.7 | 231960.4 | 259795.7 | 277961.4 | 291880.4 |
| Growth %                   | 300.0 | 440.0 | 15.0 | 12.0 | 7.0 | 5.0 |

*Source: Ministry of Finance and Economic Development & Reserve Bank of Zimbabwe, 2020*

**Key Pillars of the NDS1**

99. The NDS1 framework is organised around the key interconnected pillars that are aimed at achieving sustainable economic development namely, macroeconomic stability and financial re-engagement, inclusive growth, governance, infrastructure and utilities, social development in line with vision 2030 agenda. These key pillars will
economic growth through policy interventions and related increased investments in agriculture, mining, manufacturing, tourism, energy, public infrastructure, improved service delivery in education and health, as well as expanding the frontiers of the digital economy.

Overview of the NDS1 National Priorities

Economic Growth and Stability

100. The objective of the NDS1 Macroeconomic Frameworks to sustain a positive high economic growth of above 5% will be driven by agriculture, mining, electricity and manufacturing. This is also based on swift implementation of structural reforms aimed at removing bottlenecks and improving economic efficiency.

Food and Nutrition Security

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

102. In agriculture, fundamental to the projected economic growth, is resolving the security of land tenure and adoption of climate smart agriculture strategies. The NDS1 will facilitate access to affordable agricultural financing through various strategies including, establishing a Land Bank, strengthening the use of PPPs, as well as reviewing the contract farming and agricultural marketing frameworks to cover all crops and livestock.

Moving the Economy up the Value Chain and Structural Transformation

103. The process of structural change is central to stimulating inclusive and sustained growth pattern that enable more people to benefit from higher productivity levels
in more advanced segments of the economy. During the NDS1 Period (2021–2025), the broad objective is to rebalance the economy through:

- Gradually improving the contribution of the secondary sector to GDP from the current 11.7% to 15% by 2025; and
- Increasing the contribution of value added exports to total exports from 9% in 2020 to 20% by 2025.

104. Broadly, the key link to structural transformation is value addition and beneficiation of agriculture and mining output. Priority will be placed on developing and strengthening already existing value chains, decentralisation of industrialisation initiatives and provision of a consistent, stable policy environment.

*Infrastructure and Utilities*

105. During the NDS1 Period, efficient infrastructure delivery will be key in the realisation of National Priorities and overall socio-economic development. This will involve restoration of basic infrastructural services, including expansion in critical areas mainly targeting the key sectors of energy, transport, water and sanitation, housing, health, education and information and communication technology.

*Digital Economy*

106. Information Communication Technologies (ICTs), are key enablers of economic development, hence the entrenchment of ICTs across all national development strategies is critical for attainment of universal access by 2030. In order to ensure improved access and usage of ICTs during the NDS1 Period, Government targets to increase internet penetration rate from 59.1% in 2020 to 75.4% by 2025. Further, the mobile penetration rate is also expected to increase from 94.2% to 100% by 2025.
107. Given the huge housing backlog and the inadequacies of attendant infrastructure, Government will, through the NDS1, prioritise citizens’ access to affordable and quality settlements in urban and rural areas. Delivery of affordable and quality settlements is a shared responsibility with various contributing partners in the public, private and non-governmental sectors including local communities and international development partners. Government will create an enabling environment for all stakeholders to work together for effective housing delivery.

108. The overarching objective of Governance Priority Area during the Strategy Period is to improve Public Service Delivery, Justice Service Delivery, Rule of Law and uphold National Unity, Peace and Reconciliation as the building blocks for achieving equitable and sustainable national development. The NDS1 will also seek to improve on public sector transparency and accountability, improved disaster risk management, enhanced ease of doing business and reduction in corruption among others.

109. During the NDS1 Period, Government will ensure availability of social protection for all. This will entail undertaking measures that will improve access to inclusive social protection. The objective of the NDS1 is to reduce extreme poverty and improve access to basic social services in all its forms and dimensions, including narrowing inequalities.

110. Vulnerable groups need to be protected and these include persons with disabilities, children and the elderly. These need to be cared for and accordingly the NDS1 will ensure these groups are taken care of through new interventions and modification to existing programmes.

21
Image Building, International Engagement and Re-Engagement

111. The advent of the Second Republic ushered in a strategic opportunity to improve the country’s image and international relations. A good image and improved international relations will provide leverage for the country’s quest for competitiveness to attract investment, promote economic growth and national wealth within the context of globalisation.

112. A robust information management and dissemination strategy, making Zimbabwe an attractive investment destination and building a highly competitive national brand bolstered by the implementation of the engagement and re-engagement drive in support of a shift from traditional diplomacy to economic diplomacy, has huge potential to improve the country’s image, strengthen relations with the international community and boost the economy in line with Vision 2030.

Environmental Protection, Climate Resilience and Natural Resources Management

113. The thrust of environmental protection, climate resilience and natural resource management under the NDS1 will be on sustainable management of wetlands, rehabilitation of mined areas, climate change mitigation and sustainable natural resources management.

Youth, Sport and Culture

114. Since youths are a valuable resource for Zimbabwe especially if they are allowed to build and strengthen personal qualities that enable them to grow and flourish throughout life, the NDS1 will focus on youth issues that will ensure that the country significantly benefit from the demographic dividend.
115. The NDS1 also prioritises cultural and sport issues, as they are important for nation building as well as for peace and reconciliation. Sport and Culture not only enhance the quality of life of people but represent a leisure economy, which generates significant employment opportunities especially for the youths.

*Health and Wellbeing*

116. Since health is central to human happiness and well-being, the NDS1 prioritises health and wellbeing issues. Health and wellbeing make an important contribution to economic progress, as healthy populations live longer, are more productive and accumulate more savings.

*Human Capital Development*

117. Human Capital Development and Innovation remains the engine to drive the NDS1 and the country’s prospects towards Vision 2030. Human Capital Development and Innovation create a knowledge driven economy for sustained growth, industrialisation and modernisation of Zimbabwe.

*Devolution*

118. During the Strategy Period, the Government seeks to maintain at least 5% of national revenues to intergovernmental fiscal transfers to lower tiers of Government, to ensure full implementation of the following strategies:

- Formulation and enactment of the necessary legal framework;
- Improve the Ease of Doing Business in Provinces; and
- Promote investment to attract local and foreign investment.
Fiscal, Monetary and External Sectors

Fiscal Sector

119. On the fiscal front, the Government thrust is to maintain prudence by keeping deficits under control and reducing public debt to below 70% of GDP. This will be anchored on strengthening revenue collection effort through reviewing and streamlining tax incentives, formalising the informal sector, upgrading of the audit and tax services of large taxpayers, as well as linking ZIMRA systems with other agencies.

120. On the expenditure side, the strategy will be to strictly adhere to the approved budget and stop accumulation of arrears, review the subsidy policy to ensure better targeting, fast track State Enterprise and Parastatal reforms and full roll out of the Public Finance Management System to ensure full utilisation.

121. With regards to managing public debt, the strategy will be to limit recourse to Central Bank borrowing and listing of Bonds on the Securities Exchange Market. External debt arrears clearance will be determined by progress on engagement and re-engagement with the international community.

Money and Financial Sector

122. The Government seeks to consolidate the monetary and financial stability with the goal of gradually reducing inflation to single digit levels by 2025. This will be based on implementation of a monetary targeting framework and stabilisation of the exchange rate system. Further, monetary stability will be underpinned by strengthening coordination of the tool kits available to the Ministry of Finance and Economic Development and Reserve Bank of Zimbabwe.

123. On the financial sector side, stability will be enhanced through strengthening of prudential supervisory policy framework that include implementation of Financial
Sustainability Standards, re-enforcing capital adequacy levels, full implementation of Basel III accord, and operationalisation of the Collateral Registry. Further, Government will come up with a comprehensive financial sector development strategy, which will re-engineer the financial sector to enable it to support initiatives under the NDS1.

External Sector

124. On the external front the objective is to maintain a sustainable current account balance of not more than -3% of GDP and gradually build foreign reserves to around six months of import cover by 2025.

125. This will be underpinned by promotion of export products and export markets diversification as well as implementation of reforms aimed at streamlining and simplifying exporting and importing procedures, eliminating customs delays and improving customs administration.
CHAPTER 3

ECONOMIC GROWTH AND STABILITY

Introduction

126. Economic growth and stability is a prerequisite for sustainable development, which contributes to improved livelihoods for all. Macroeconomic stability creates certainty and builds confidence in the economy. The overall success of the NDS1 is, therefore, premised on realising increased economic growth and stability. Key priority areas under Economic Growth and Stability Thematic Area are Sustained Economic Growth, Macroeconomic Stability and Inclusive Growth.

Sustainable Economic Growth

Situational Analysis

127. The country is endowed with vast natural and human capital resources, which are critical in sustaining economic growth and development. The economy, however, for long, has been experiencing volatile growth. In 2019 and 2020, the economy experienced sustained recession with GDP estimated to have contracted by -6.0% and -4.1%, respectively. Contributing to volatile growth were output losses in agriculture and manufacturing activities. Figure 5 below shows trends in Real GDP growth over the last decade.
128. GDP growth volatility was a consequence of perennial challenges related to macroeconomic instability and structural rigidities characterised by weak institutions, corruption, rent seeking behaviour and infrastructure deficiencies in energy, transport, health, education, water and sanitation. Further, this was also worsened by policy inconsistencies and reversals as well as delays in policy implementation.

129. In addition, there were unforeseen exogenous shocks such as natural disasters including the last two consecutive severe droughts, Cyclone Idai and emergence of the COVID-19 pandemic.
130. However, Government through the TSP, has implemented measures to ensure policy consistency, strengthen institutions, improve resilience against shocks and accelerate reforms, which will be further sustained during the NDS1 Period.

**Outcomes of Sustainable Economic Growth**

131. During the NDS1 Period, the aspiration is to achieve increased per capita income to around US$3 200 by 2025. This will be supported by increased GDP growth and investment levels. This resonates well with the objective of Vision 2030 of becoming an upper middle income society. To ensure the country keeps track with the objective of Vision 2030, the NDS1 will focus on growing the economy at an average growth rate of above 5% per annum between 2021 and 2025.

**Key Strategies for Sustainable Economic Growth**

132. The outcome of increased and sustained economic growth will be private sector led while Government focuses on accelerating policy implementation, legal, institutional and structural reforms to strengthen macroeconomic stability as well as improving the business environment.

133. This will be complemented by interventions that increase production and productivity across all sectors as well as import substitution strategies thus domesticating key value chains that will ultimately propel export led growth in the medium to long term.

134. To unlock investment, which is key in driving sustainable economic growth, the Strategy will prioritise swift implementation of the ease of doing business reforms, respect of property rights, ensuring rule of law, combating corruption and prioritising investment in key enablers.
The Locomotive Sectors for Sustainable Growth

135. Production and productivity in locomotive sectors such as agriculture, mining, manufacturing and tourism will be key in achieving the overall goal of sustainable economic growth.

136. Strong sectoral growth rates are envisaged during the NDS1 Period, as indicated in the Table 3 below. These growth rates will be underpinned by recovery in the Global economy, stable macroeconomic environment, gradual recovery from COVID-19 pandemic and political will to swiftly implement sectoral policies.

Table 3: Sectoral GDP Growth Rates (%) (2019-2025)

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall GDP</td>
<td>-6.0</td>
<td>-4.1</td>
<td>7.4</td>
<td>5.5</td>
<td>5.2</td>
<td>5.2</td>
<td>5.0</td>
</tr>
<tr>
<td>Agriculture and forestry</td>
<td>-17.8</td>
<td>-0.2</td>
<td>11.3</td>
<td>8.9</td>
<td>7.6</td>
<td>9.5</td>
<td>10.4</td>
</tr>
<tr>
<td>Mining and quarrying</td>
<td>-12.4</td>
<td>-4.7</td>
<td>11.0</td>
<td>7.4</td>
<td>8.8</td>
<td>9.2</td>
<td>8.0</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>-8.7</td>
<td>-9.6</td>
<td>6.5</td>
<td>6.5</td>
<td>7.7</td>
<td>6.1</td>
<td>5.9</td>
</tr>
<tr>
<td>Electricity and water</td>
<td>-19.2</td>
<td>-7.9</td>
<td>18.8</td>
<td>14.4</td>
<td>5.9</td>
<td>4.5</td>
<td>4.8</td>
</tr>
<tr>
<td>Construction</td>
<td>-13.9</td>
<td>-11.4</td>
<td>7.2</td>
<td>5.0</td>
<td>4.0</td>
<td>5.0</td>
<td>4.0</td>
</tr>
<tr>
<td>Distribution</td>
<td>-8.2</td>
<td>-6.8</td>
<td>5.7</td>
<td>5.5</td>
<td>5.0</td>
<td>4.5</td>
<td>4.1</td>
</tr>
<tr>
<td>Transport and Communication</td>
<td>12.9</td>
<td>3.4</td>
<td>7.1</td>
<td>4.5</td>
<td>4.3</td>
<td>4.8</td>
<td>4.4</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>-6.1</td>
<td>-6.5</td>
<td>7.2</td>
<td>3.3</td>
<td>5.2</td>
<td>6.1</td>
<td>5.0</td>
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<tr>
<td>Government Services</td>
<td>1.4</td>
<td>-2.1</td>
<td>6.2</td>
<td>2.9</td>
<td>2.5</td>
<td>2.3</td>
<td>2.0</td>
</tr>
<tr>
<td>Other Services</td>
<td>-3.7</td>
<td>-2.0</td>
<td>4.4</td>
<td>2.7</td>
<td>2.6</td>
<td>2.5</td>
<td>2.5</td>
</tr>
</tbody>
</table>

Source: Ministry of Finance and Economic Development and RBZ, 2020

Key strategies for productive sectors

137. The sector growth strategies that anchor the NDS1 will be based on optimal exploitation of abundant opportunities in agriculture, mining, tourism and electricity generation. The manufacturing sector will benefit from resuscitating and strengthening existing value chains and developing new value chains as well as mineral beneficiation.
138. Productivity will be key in driving the sectoral growth. Accordingly, the Zimbabwe National Productivity Institute will be established to spearhead the promotion of productivity consciousness in all sectors of the economy.

139. The envisaged growth trajectory will also be underpinned by implementation of the following sector specific strategies:

**Strategies for Agriculture**

140. The agriculture sector has potential to drive pro-poor economic growth and sustainable development. Key to unlocking the potential is resolving the security of tenure on the land in order to attract investment. Further, measures will be put in place which will create conditions for bankability of agricultural projects. Equally important will be restructuring of Agribank into a Land Bank, and expansion of contract farming to other crops and livestock as well as strengthening existing contract farming arrangements. Further, Government will incentivise banks to lend to agriculture and persuade them to move away from the current practice where most banks are investing in non-productive short term instruments.

141. In order to drought proof agriculture, irrigation rehabilitation and expansion, promotion and adoption of research that improves productivity of seed and animal varieties, upscaling of climate smart agriculture practices such as Pfumvudza/Intwasa, and capacitation of extension services will be prioritised.

142. Further, to improve predictability in the marketing of agricultural produce, the strategy under the NDS1 will be to operationalise the commodity exchange, supported by a well-functioning regulated warehouse receipt system.
Strategies for Mining

143. The country is endowed with over forty minerals including gold, Platinum Group Metals (PGMs), diamonds, coal, gemstones, granite, manganese, chrome, lithium, asbestos, iron ore, copper, nickel, cobalt, limestone, coal-bed methane (CBM) and rare earth minerals.

144. Weak governance in the sector has, however, been the major limiting factor. In order to achieve increased and sustained growth in the mining sector, priority during the NDS1 Period will be to improve the ease of doing business in the sector. This will be realised through finalisation and implementation of mineral specific policy frameworks and a comprehensive review of the Gold Trade Act, Precious Stones Trade Act and amendment of the Mines and Minerals Act.

145. Further, Zimbabwe has 19 of the world’s rare earth minerals. In order to designate these strategic assets and direct investment into their exploitation, Government, during the NDS1 Period will expedite the formulation of Rare Earth Minerals Policy.

146. Zimbabwe is underexplored. Government has not been approving Exclusive Prospecting Orders (EPO) despite mineral exploration being vital for mineral resource quantification. The country has thus lagged behind in terms of new discoveries and large-scale investments. During the NDS1, Government will prioritise approval of Exploration Title and capacitation of Mining Promotion Corporation to undertake targeted exploration.

147. In addition, priority will be extended to formalisation and capacitation of the small-scale miners through the Mining Industry Loan Fund. To prevent speculative hoarding of claims across all minerals, Government will strengthen the enforcement of the “Use It or Lose It” principle.
148. During the NDS1 Period, operationalisation of the automated Mining Cadastre Information Management System will be accelerated to increase efficiency and transparency in mining title management.

149. During the NDS1 Period, programmes will be undertaken to enhance exploration. Incentive such as ‘Finders Keep it Principle’ will be adopted to encourage exploration. However, a time frame to utilise the findings will be adopted after which the ‘Use it or Lose Principle’ will apply.

150. The country has hardly realised the full value of its mineral resources due to leakages. These take the form of transfer mispricing, smuggling and under declaration.

151. Compounding the challenges of limited exploration are vulnerabilities related to inadequate scrutiny around agreements with investors, including fiscal concessions. In order to bring transparency and fair share of Government in minerals exploitation, NDS1 will prioritise formation of an investment committee comprising of OPC, Ministry of Mines and Treasury, chaired by ZIDA in assessing capable investors and overseeing investment agreements.

152. Government, during the NDS1 Period will prioritise plugging of mineral leakages. In order to curb under declaration, Government will upgrade its Metallurgical Laboratory to meet internationally accredited standards and ensure mandatory valuation of all export consignments. This will be complemented by installation of weigh bridges at all ports of exit.

153. To reduce smuggling, Government will strengthen metallurgical accounting by capacitating the monitoring and surveillance under the Minerals Marketing Corporation of Zimbabwe (MMCZ) and the Minerals Fauna and Flora Unit. Further, ZIMRA capacity to address transfer mispricing of minerals will also be enhanced.
154. Unlocking the mining potential requires guaranteed long term financing. During the NDS1 period, establishment of a gold reserve fund will be prioritised as a vehicle to mobilise finance. This will be complemented by setting up of a minerals commodity exchange, which will trade all other minerals, except for gold.

155. Growth of the mining sector will be anchored on opening of new mines, as well as the resuscitation of closed ones, projects expansion, increased capacity utilisation, and value addition and beneficiation. Key flagships during the NDS1 Period include platinum, chrome, gold and coal projects.

Strategies for Manufacturing

156. The achievement of increased and sustained economic growth requires orienting the economy towards higher value added activities and production of complex products. Critical interventions involve targeting and strengthening existing value chains and mineral beneficiation.

157. The value chains that will be prioritised are mainly those existing in agro processing. These include the soya bean, cotton, leather and fertiliser value chains. Outside agro processing, priority will be to resuscitate the pharmaceutical and bus and trucks assembly value chains.

158. Regarding mineral beneficiation, the NDS1 priority is to strengthen gold processing, diamond cutting and polishing, platinum base metal refining and ferrochrome processing.

159. Resuscitation of value chains will be supported by scaling up of innovation hubs and industrial parks.
Strategies for tourism

160. Tourism sector is anchored on abundant natural resources such as wildlife and scenery, which sustains tourism development in Zimbabwe. Tourism arrivals experienced an average growth rate of 6% per annum over the period 2015-2018. This growth in arrivals was driven by the notable increase in arrivals from nearly all traditional source regions and most major tourism generating markets as shown in Figure 6 below.

![Figure 6: Tourism Growth 2015-2018](source: ZTA 2020)

161. However, the year 2019 was a difficult year for the tourism industry as arrivals fell by 11% compared to 2018 as shown in Figure 6 above. This was due to the volatility of the operating environment for the tourism sector characterised by continued circumstances of cash shortages, rising prices, pricing distortions, fuel and electricity shortages and negative destination perceptions.

162. The tourism industry has been one of the worst-hit sectors by the COVID-19 pandemic, with hotels and operators experiencing reduced business owing to...
During the NDS1 planning period, the tourism sector is expected to immediately turning around its fortunes riding on its resilience and its low hanging status as a low investment and high output sector. Further, the improved operating environment owing to continued economic stability and enabling infrastructure developments such as the ongoing upgrading of the Beitbridge-Harare-Chirundu and the Karoi-Binga Highways among others, will widen opportunities for further tourism growth.

The country continues to experience negative perceptions in key source markets and this has restricted tourism growth. This underlies the need to address country image issues and accelerate destination marketing amongst other initiatives. The implementation of the NDS1 will focus on achieving the national outcome of increasing the contribution of tourism to GDP from 1.1% in 2020 to 5% by 2025.

*Improving Tourism Growth*

The growth of the Tourism Sector will be anchored on increased investment in diversified tourism products such as heritage tourism, medical tourism and community based tourism, among others. Key flagships will be the opening up of new Tourism resorts in Kanyemba, Tugwi Mukorsi, Kariba and the development of new nodes anchored on the Victoria Falls Special Economic Zone, notably in Masuwe, Batoka, Gwayi Shangani Dam, Binga and Sijarira.

This will be complemented by the operationalisation of the Tourism Support Scheme to enhance funding for the Tourism Recovery and Growth of the sector and the provision of appropriate incentives to promote foreign and local investment, especially in the Tourism Development Zones.
167. In addition, priority will be given to enhanced destination marketing, through improved marketing programmes and market representation to generate demand in traditional and emerging source markets such as the Middle East, Asia, Eastern Europe. Focus will also be on destination branding and image transformation.

168. Emphasis will also be placed on promoting the Meetings, Incentive, Conferences and Exhibition (MICE) tourism. Further promotion of domestic tourism through developing appropriate facilities, incentives and initiatives will be pursued. This will also include focus on Diaspora Tourism Promotion.

169. Critical intervention will include the up-scaling of the implementation of the National Tourism Recovery and Growth Strategy, the National Tourism Master Plan, Review of Tourism Policy and Legislation, ease of doing business reforms and improved use of ICT in the sector.

170. During the NDS1 Period, focus will be on enhanced destination accessibility through attracting new airlines, strengthening the national airline and opening up domestic air routes to local players. Government will also upgrade and modernise road networks to promote drive through tourism, improve road signage and continuously review immigration policies to improve the competitiveness of the destination.

171. Further, in order to climate proof the Tourism Sector, Government will promote ecotourism and green practices as well as sustainable inclusion of communities in the tourism value chain.

172. Government will also finalise the Tourism Satellite Account in order to improve the accounting of the performance of the Tourism Sector.
Programmes

173. To achieve tourism growth the following programmes will be implemented during the NDS1 Period:

- Product Development and Diversification;
- Markets Development and Diversification;
- Destination accessibility;
- Tourism investments promotion; and
- Tourism Policy and Legislative Review

Strategies for Electricity Supply

174. The major key enabler in realising sustained economic growth is electricity supply. In order to achieve the objective of powering the economy towards sustained economic growth during the Strategy Period, the existing generation capacity will be optimally utilised through upgrading, rehabilitation and maintenance.

175. Priority will also be extended to development of new generation capacity through fast tracking ongoing projects and opening new projects, which take cognisance of a diversified energy mix.

176. During the NDS1 Period, Government policy will accommodate construction of Independent grid operators wishing to wheel power to their dedicated clients.

177. During the NDS1 Period, Government will accelerate the implementation of an integrated comprehensive power generation and transmission framework, which will incorporate Independent Power Producers enabling them to access the electricity market. The framework will cover infrastructure sharing, licencing as well as
consumer protection amongst others, whilst ensuring conformity to national power generation and transmission standards.

Programmes for Sustained Economic Growth

178. Key programmes that will be prioritised in order to realise sustained high economic growth objective under the NDS1 include the following:

- Economic Rebalancing;
- Production and Productivity promotion; and
- Investment promotion

Macroeconomic Stability

179. Maintaining macroeconomic stability is a prerequisite for sustained and inclusive development. It acts as a buffer against currency fluctuations and large debt burdens. Stability has been witnessed after a long period of exchange rate volatility and rising inflation driven by policy missteps involved during the introduction of the local currency and previously high fiscal deficits.

Monetary Policy

Situational Analysis

180. The restoration of monetary policy through de-dollarising came at a significant cost of adjustment. This was amplified by delayed policy implementation, partial reversals in the foreign exchange market policies, significant reserve money expansion and market indiscipline.

181. Annual headline inflation rose from a single digit in January 2018 to reach 837.5% by July 2020, while the local currency depreciated from US$1: ZWL$1 in 2018 to US$1: ZWL$81 by September 2020. Reserve money grew from ZWL$3.25 billion in
December 2018 to ZWL$16.66 billion as at the end of July 2020, before being reduced to ZWL$14 billion by end of September 2020.

182. There is, however, growing evidence of monetary policy prudence and macroeconomic stability following implementation of measures to control reserve money and to stabilise the exchange rate.

183. Consequently, the parallel exchange rate premiums have declined from above 300% to below 10% in October and monthly inflation to 1.3% (blended CPI) and 4.3% (local currency CPI) in October 2020.

**Monetary Policy Outcomes**

184. The NDS1 seeks to consolidate the gains made in restoring monetary policy, with major outcomes of improved currency and price stability. This will be realised by achieving the following targets:-

- Reducing inflation to single digit levels of between 3% and 7% by 2025 in line with SADC Macroeconomic Convergence Targets;
- Building reserves from less than one month import cover in 2020 to six months import cover by 2025;
- Exchange rate stability;
- Align reserve money growth to levels consistent with low and stable inflation as well as exchange rate stability;
- Increased use of Zimbabwe dollar as the dominant legal tender by 2025 and
- Financial sector stability.

185. Figure 7 below summarises the Reserve Bank’s three-pronged policy strategy under the NDS1.
Monetary Policy Strategies

186. The key focus of the Reserve Bank during the NDS1 Period will be on maintaining price and financial stability necessary for effective planning and preservation of the value of the local currency. Price stability entails both the internal (inflation and interest rates) and external (exchange rate) value of the country’s currency. To achieve this, the Central Bank will pursue a three-pronged approach of exchange rate stabilisation, money supply management and financial sector stability. This strategy will achieve price stability, the ultimate objective of monetary policy.
Exchange Rate Stability

187. The Central Bank will improve and enhance the efficiency of the foreign exchange auction system, introduced in June 2020, building on its evident positive results. The auction system improved transparency in the management of foreign exchange, as well as in establishing a credible price discovery mechanism for a market-determined exchange rate. To ensure sustainability of the system, and further buttress exchange rate management, RBZ will prioritise building of international reserves.

Money Supply Management

188. The Central Bank’s strategic focus during the NDS1 will be to maintain money supply growth rates that are consistent with the achievement and maintenance of inflation within the SADC inflation target range of 3% to 7%. This will be achieved through continued implementation of the monetary targeting framework, which has already greatly assisted in anchoring both exchange rate and inflation expectations.

Monetary and Fiscal Policy Coordination

189. To strengthen operational efficiency of monetary policy, and to consolidate the gains of policy coordination, the Ministry of Finance and Economic Development and the Reserve Bank of Zimbabwe will constitute a liquidity management team that will improve liquidity and cash flow projections, synchronise liquidity injections and withdrawals, enhance information sharing in order to foster and further deepen existing operational synergies between the two institutions.

190. Further, to enhance effectiveness of monetary policy and address governance challenges, the NDS1 will prioritise amendments to the Reserve Bank of Zimbabwe (RBZ) Act to reduce the limits of borrowing by Government from the RBZ.

191. In the same vein, deepening money and capital markets through issuance of different instruments of different maturities (medium and long-term bonds) to allow
portfolio flexibility by investors as well as resuscitation of interbank trading, will be prioritised, to smoothen monetary policy operations and Government debt management practices.

192. Coordinated and synchronised measures by the RBZ and Treasury will significantly deflect speculative behaviour and indiscipline in the payment system, in particular the mobile money payment platforms, which had been used as conduits for parallel market activities.

*Monetary Policy Programmes*

193. Key programmes necessary to strengthen the role of monetary policy in stabilising the economy during the NDS1 Period include;

- Currency and price stability;
- Exchange rate management;
- Liquidity management;
- Foreign reserves build-up; and
- Legislative and regulatory framework review.

*Financial Sector Stability*

*Situational Analysis*

194. The performance of the banking and financial sector was considered satisfactory during the period ended 30 June 2020. As at 30 June 2020, the banking and financial sector aggregate core capital was ZWL$20.99 billion, representing an increase of 180.99%, from ZWL$7.47 billion as at 31 December 2019.

195. Further, the banking and financial sector is composed of 19 banks and 60% are small banks that have thin capital, which is not capable of bankrolling large domestic projects and programmes.
196. The main outcome of the financial sector during the NDS1 Period is to improve financial stability. This will be achieved through:-
   - Increasing bank capitalisation to US$30 million;
   - Reducing the Portfolio at Risk for Microfinance Institution from 12.7% in 2020 to 5% by 2025; and
   - Maintaining non-performing loans below 5%.

Strategies for Financial Sector Stability

197. The financial sector plays a critical role in ensuring sustainable growth through mobilising savings, directing funds into productive sectors, management of risks, efficient allocation of resources and facilitating delivery of products and services. Financing of NDS1 programmes and projects is thus premised on the efficiency of financial sector.

198. In order to realise improved financial sector stability, the NDS1 will adopt a prudential supervisory policy framework that includes implementation of the Financial Sustainability Standards, enforcing capital adequacy levels, full implementation of Basel III accord, and operationalisation of the Collateral Registry.

199. Further, there will be a comprehensive review of the regulatory framework to address: corrective and sanctioning regime, operational independence, resolution, ownership changes and major acquisitions.

200. To ensure smooth and efficient payment systems, the Strategy will prioritise development of a National Switch and institutional framework to achieve interoperability of payment systems.

201. In order to chart the financial sector strategic direction, focus will be on the development and implementation of the financial sector strategy whose objective is to expand financial intermediation and support maximum growth.
Financial Sector Stability Programmes

202. Prioritised programmes to improve financial sector stability under the NDS1 Period will include:

- Legislative and regulatory framework review;
- Financial sector supervision and oversight; and
- Financial Sector Development.

External Sector

203. The external sector has improved since 2018. Exports increased from 20.3% of GDP in 2017 to a peak of 36.2% in 2019, before declining to 27.2% in 2020. However, the increase is largely driven by primary products which include tobacco and gold exports, which are vulnerable to international commodity price fluctuations.

204. Imports contracted sharply in 2019 and 2020 by -32.1% and -10.5%, respectively, owing to declining domestic demand and policy interventions. The decline was driven by a fall in consumptive imports.

205. Consequently, the current account has been improving from sustained deficits to a surplus beginning in 2019.

206. Access to external capital, however, remains constrained due to the perceived high country risk and an unfavourable investment climate. The country is thus relying on expensive commercial debt and securitisation of export proceeds. International reserves of less than a month of import cover are critically low.
**External Sector Outcomes**

207. During the NDS1 Period, the objective will be to ensure sustainable Balance of Payments that provides a buffer against transitory productivity and demand shocks. Specific objectives include:-

- Maintaining a current account balance of not more than -3% of GDP in line with SADC macroeconomic convergence targets; and
- Increasing international reserves to more than six months import cover in line with SADC macroeconomic convergence target.

**Strategies for External Sectors Stability**

208. In order to consolidate external sector stability, a combination of export orientation and import substitution strategies will be prioritised during the Strategy Period, particularly where the country has competitive advantage.

209. Regarding export orientation, NDS1 will focus on promoting export products and export markets diversification. This will be complemented by enhancing export promotion activities, market access negotiations, and institutional capacity building of trade promotion organisations such as ZimTrade, Zimbabwe Tourism Authority, the Competition and Tariffs Commission, Standardisation bodies and the Zimbabwe International Trade Fair Company.

210. There are a number of services, which offer the country immense opportunities in trade. During the NDS1 Period, Government will promote and improve the enabling environment for increased trade in services.

211. Given the high concentration of commodity exports, NDS1 will pursue value addition and beneficiation. These will be achieved through strengthening mineral and agricultural value chains, reviewing the legislative environment and provision of key enablers.
212. Regarding the containment of import growth and ensuring that the generated foreign currency is saved, the country will prioritise import substitution through the domestication of value chains and the reviewing tariff and non-tariff measures to enable importation of critical raw materials and capital goods. Also important will be promotion of the Buy Zimbabwe Campaign and increasing domestic production of major critical imports such as maize, wheat and soya beans.

213. Trade facilitation is a key factor in the country’s trade policy. In this regard, Government will implement reforms aimed at streamlining and simplifying exporting and importing procedures, eliminating customs delays and improving customs administration.

External Sector Programmes

214. Key programmes to ensure sustainable balance of payments during the NDS1 Period include;
- Export Promotion;
- Import Substitution;
- Investment promotion; and
- Trade Facilitation.

Fiscal Policy

Situational Analysis

215. The country managed to restore fiscal stability following periods of high fiscal deficits, which peaked at 12.9% of GDP in 2017. Government through TSP introduced a raft of fiscal consolidation measures in 2018, which saw expenditure declining to 13.9% of GDP in 2019 from 30.8% of GDP in 2107 and fiscal balance closing in a surplus in 2019.
216. The side effects of fiscal consolidation, however, have largely been wage compression, which saw real wages declining from 14% of GDP in 2017 to 3.8% of GDP in 2019.

Fiscal Position

217. Fiscal sustainability, however, is facing threats arising from weakening revenue collections, which gradually declined from an average of 18% of GDP in 2015 to 14.2% by 2019. This is attributed to the growing informalisation of the economy; high number and value of fiscal incentives; levying of Government fees below cost recovery and leakages manifesting through smuggling; underreporting of revenue particularly on US dollar transactions and corruption. Figure 8 below, shows the fiscal position from 2015-2020.

Figure 8: Fiscal Position: 2012-2020

![Fiscal Position](image)

Source: Ministry of Finance & Economic Development, 2020

218. Also potentially undermining fiscal stability are growing wage pressures following the collapse in real wages. In addition, wage distortions across various grades and sectors has also brought instability in relativities.
219. Further, the composition of the budget was inclined towards consumptive rather than developmental expenditure. This was also exacerbated by COVID-19, which slowed down implementation of a number of projects. Rising inflation and exchange rate depreciation also gave rise to continuous revision of public sector investment contracts. Also contributing to slow project completion was the accumulation of arrears by Government.

220. Significant threats to fiscal stability relate also to regular materialisation of fiscal risks, such as State Owned Enterprises bailouts, recapitalisations and debt assumptions, most of which are being dealt with outside the budget. These off-budget actions have increased debt by 11.5% of GDP in 2019.

221. In addition, the materialisation of fiscal risks due to effects of Climate Change such as successive droughts and Cyclones, are also on the rise.

**Outcomes of Fiscal Policy**

222. In the wake of recent challenges arising from Cyclones, the COVID-19 pandemic and successive droughts, the focus of fiscal policy during the NDS1 Period is to maintain a sustainable fiscal balance, restoring budget credibility and re-orienting the national budget towards developmental goals. Specifically, NDS1 envisages fiscal prudence guided by the following fiscal anchors:-

- Maintaining average fiscal deficit of not more than 3% of GDP in line with SADC Macroeconomic Convergence target;
- Gradual increase in development budget from the current 3.8% to 6% of GDP by 2025;
- Reducing the wage bill as percentage of revenue from 47% in 2020 to 40% in 2025; and
- Non-accumulation of domestic arrears.
Fiscal Policy Strategies

223. Maintaining fiscal stability is key in ensuring macroeconomic stability through deliberately changing public spending and tax instruments to offset economic fluctuations. The overall strategy of fiscal policy during the NDS1 Strategy Period is to maintain fiscal stability, while at the same time providing a supportive environment to unlock development bottlenecks and stimulate growth. Specific interventions include:-

Strategies for Revenue Collections

224. In order to strengthen revenue collection during the NDS1 Period, the following initiatives will be followed:-

Review and streamlining tax incentives

225. Tax incentives represent forgone fiscal revenue. Notwithstanding the nexus between fiscal incentives and economic growth, Government will continuously carry out Cost Benefit Analysis of the existing fiscal incentives in order to guide the review and streamlining those found to be redundant.

Widening the Tax Base

226. Small-scale businesses and the informal sector present a significant potential source of revenue considering that it constitutes a significant share of national income.

227. In order to tap into this potential, Zimbabwe Revenue Authority will establish a Specialised Unit to ensure that the sector’s contributions to fiscal revenues are commensurate with the level of economic activity. Such interventions will be supported by extensive taxpayer education and awareness programmes.
228. The Ministry of Local Government and Public Works will work in collaboration with the Ministry of Women Affairs, Community and Small to Medium Enterprises Development to ensure that operating sites and structures are identified and developed.

*Upgrading of the audit and tax services of large taxpayers*

229. Notwithstanding the need to ensure that small scale and informal sector businesses are captured into the tax net, ZIMRA will also intensify audit and tax payer services of larger taxpayers. Pursuant to this, linkage of ZIMRA systems with Local Authorities, Registrar General’s Office, Financial institutions, National Payment System, NSSA, ZIMDEF, SDF, Deeds Office and Registrar of Companies will be prioritised. Further, Government will prioritise strengthening of tax collection systems through upgrading and automation to reduce revenue leakages.

*Capacity Building for Tax Policy and Administration*

230. Capacity building is an important ingredient in tax policy and administration. In this regard, specialised training activities will be organised to adequately equip officers in policy formulation and application of tax legislation. Capacity building initiatives will target capacity gaps as may be identified both in tax policy and tax administration.

*Review of Government fees, levies, and charges to ensure cost recovery.*

231. Government services that are provided at below production cost represent an implicit subsidy, which may not be sustainable. In this regard, fees, levies and charges on Government services will be timeously and continually reviewed to guarantee service provision at or above cost recovery levels.
Strategies for Expenditure Management

232. The following interventions will be critical in ensuring prudent management of expenditures.

Review of the Structure of Public Expenditure

233. Public expenditure has, over the years been skewed towards recurrent expenditure with minimum spending towards development expenditure, which generates multiple effects in the economy. In this regard, during the Strategy Period, development expenditure will be prioritised in order to crowd in private sector investment, thereby stimulating economic growth. A minimum of 4% of GDP will be earmarked for development expenditure. To enforce efficiency in public development expenditure, Public Investment Management Guidelines\(^1\) will be fully implemented.

Review subsidy policy for better targeting and fiscal sustainability

234. Government has widened the subsidy policy to agriculture, transport and food with a view to cushion vulnerable members of society. The subsidies are, however, non-exclusive, resulting in unintended beneficiaries also proportionally benefiting. During the NDS1 Period, a more targeted approach will be implemented. A survey to identify vulnerable members of society will inform policy reviews.

Contingency Planning

235. Natural disasters have over the years induced spikes in unbudgeted expenditures leading to fiscal instability. The NDS1 Period will prioritise increasing investment in Disaster Risk Management Systems including early warning systems and contingency planning to enhance country preparedness.

\(^{1}\) The Public Investment Management Guideline were published in 2017 to enhance the quality of public investment preparation, appraisal and selection.
Adherence to Approved Budget

236. Efficient public expenditure management requires that sanctions and penalties be introduced to limit budget overruns during budget execution. In this regard, measures to ensure value for money, strict adherence to provisions of the Public Finance Management (PFM) Act, and the Public Procurement and Disposal of Public Assets Act will be strengthened. Price differentials across procuring entities should not exceed 5%.

Review of Wages and Salaries

237. The achievement of the NDS1 also depends on the efforts and work of a motivated workforce in the public sector. Regular review of remuneration will thus be prioritised in order to maintain real wage levels. A single spine salary structure, with defined relativities will be implemented. Furthermore, public sector productivity will be strengthened through extensive application of Performance Management Systems.

Full roll out of PFMS

238. Spending within the system is key in efficiently managing expenditure. However, some MDAs are still spending outside the system and this presents a huge fiscal risk. During the NDS1 Period, Government will expedite the full roll out of the Public Finance Management System to all Provinces and Districts. Direct interface between PFMS and the RBZ core banking system to enable automatic banking reconciliations and timely comprehensive production of fiscal reports will be accelerated.

239. In addition, Government will ensure full utilisation of the PFMS system by imposing strict sanctions on those who bypass it.
Expediting State Enterprises and Parastatal Reforms

240. State Owned Enterprises have over the past years induced unprecedented fiscal pressures. Pricing of goods and services provided by SOEs are often controlled to levels below market prices, resulting in underperformance of the SOEs. Furthermore, SOEs debt guarantees generate significant fiscal risks that directly affect expenditure management. In addition, Government has not adequately exercised its shareholder function on SOEs.

241. During the NDS1 Period, Government will conduct a series of studies to determine an appropriate model which will create effective shareholder ownership, accountability, quality corporate governance as well as delivery of quality services at competitive prices.

242. In the interim, Government will expedite SOEs reforms targeting improved governance, provision of services at viable prices, full or partial privatisation, demergers, outright disposals and amalgamations of some SOEs into existing Government departments.

Full implementation of pension reforms

243. Government is currently implementing a Pay As You Go pension scheme, which is unsustainable. To reduce fiscal risks associated with the scheme, Government will accelerate the migration from Pay As You Go to a funded pension scheme.

Improved Fiscal Transparency

244. Fiscal transparency provides important information and feedback among the Executive, Parliament and the citizens thereby creating public trust and goodwill. Government has since 2012 prioritised fiscal transparency. Notwithstanding
significant progress realised in enhancing fiscal transparency, there is potential for improvement.

245. In this regard, Government will prioritise extensive citizen engagement on fiscal policy formulation, timely publication of comprehensive fiscal data and enhancing budget documentation and quality of reports over the Strategy Period.

246. Government, during the NDS1 Period will also strengthen fiscal reporting by ensuring compliance with the constitutional and legal requirements in respect of public finance management and financial reporting, enhancing coordination across Ministries in sharing fiscal data for all public sector entities, and enforcing sanctions on MDAs and officials who fail to submit fiscal reports.

247. Further, introducing data dissemination dates and publishing regular and timely data will also be prioritised.

Public Debt Management

248. Zimbabwe’s total debt as at end of 2019 was estimated at ZWL$143 billion (80.8% of GDP) against the Public Debt Management Act target of 70%. Of this debt, domestic debt including ZAMCO (ZAMCO-ZW$1.1 billion) stood at ZW$ 11 billion. Total Public and Publicly Guaranteed (PPG) external debt position stood at US$8.09 billion and about 74 % (US$5.97 billion) are arrears.

249. Worsening the country’s debt position is the accumulation of external arrears. In addition, there is high risk of moral hazard, with many public entities approaching Government for debt assumption.
Outcomes of Public Debt Management

250. Managing public debt is critical in order to raise the required amount of funding while at the same time ensuring it is sustainable. During the NDS1 Period, public debt management will focus on achieving the following targets:

- Maintaining public debt to GDP level below 70% by 2025; and
- Zero recourse to Central Bank borrowing

Public Debt Management Strategies

251. Zimbabwe is in debt distress, with unsustainable public and publicly guaranteed total external debt and large external debt arrears. Debt resolution with creditors through the clearance of external debt arrears and debt relief will open new lines of credit for the economy, which is critical to the achievement of Vision 2030 goals. External debt arrear clearance and debt relief to restore sustainability will be considered in line with progress made with Government’s engagement and re-engagement with the international community.

252. Managing new debt commitments will require a coordinated approach in line with Public Debt Management Act provisions limiting the Debt to GDP ratio to 70%. Debt Management over the NDS1 period will be guided by a Medium Term Debt Strategy and the Debt Sustainability Analysis indicators. The debt strategy will focus on maximising access of concessional financing. This debt strategy will ensure consistency between the capacity to service the debt and minimising costs with the objective of fiscal consolidation. Non-concessional borrowing will only be contracted for commercially viable projects with a high rate return, such as infrastructure

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2 The objectives of the Medium Term Debt Strategy include building and strengthening public debt management capacity
3 Debt Sustainability Analysis ensures that countries that have received debt relief are on a sustainable development track
projects. The debt strategy will also incorporate private sector driven financing options to ensure debt sustainability.

253. To ensure debt transparency, comprehensive public debt reports detailing the stock of public debt and its main features, will continue to be regularly published.

254. The continuation of an Auction-Based treasury bills issuance regime will be informed by the macroeconomic indicators especially inflation and will be based on an Annual Borrowing Plan and Issuance Calendar. Government is borrowing mainly short-term which is costly.

255. In order to reduce the cost of borrowing and deepen the capital markets, Government during the NDS1 Period will target the issuance of medium to long term securities and listing of Bonds on the Securities Exchange Market.

256. This will reduce the costs of domestic borrowing and create fiscal space for social expenditures and the capital budget. In addition, Government remains committed to its engagement with IFIs through the IMF Staff Monitored Programme to achieve an amicable loan arrears clearance agreement

**Development Assistance Coordination**

257. Development Partners continue to play a pivotal role in complementing Government’s development agenda. Over the years, however, development assistance was being channelled without proper coordination. This was due to lack of effective development coordination mechanisms and weak Government led multi-stakeholder structures.
Outcomes of Development Assistance Coordination

258. To enhance coherence in public sector interventions, Government, through NDS1 will ensure effective coordination of development assistance. In this regard, it is envisaged that development assistance will increase from US$500 million in 2020 to US$1 billion by 2025.

Strategies to Improve Development Assistance Coordination

259. Cognisant of the need to ensure conformity with international best practices, as well as strengthen the Development Assistance Coordination Architecture during the Strategy Period, Government will operationalise and fully implement the Development Cooperation Policy and Procedures Manual.4

260. Further, Government will operationalise Sector Working Groups to coordinate and interface with various development partners.

261. Priority will also be to develop and install the Aid Information Management System to enhance transparency and accountability of received development assistance.

Inclusive Growth

262. Despite having experienced episodes of significant growth in the economy, this has not translated into notable decent employment generation. The growth remained relatively non-inclusive, thus, benefitting a few. There is need, therefore, to ensure that during Strategy Period, no one is left behind in line with the thrust of Vision 2030.

4 The Development Cooperation Policy and Procedures Manual covers mobilisation, management, implementation, monitoring and evaluation, as well as reporting of development cooperation to ensure adherence to implementation and monitoring of the Development Cooperation Policy.
Decent Work

Situational Analysis

263. The country’s decent employment base is persistently being eroded, with many employment activities going underground, further shrinking the absorptive capacity of the labour market. Formal net job creation in the country has been negative since 2013.

264. Of the 2.9 million people employed in 2019, 930 000 were formally employed, 975 000 were informally employed and 990 000 were households. Out of total employed people, about 552 000 (19%) were in precarious employment and the majority were in the age group of 20 to 40 years. This reflects the growing risk of missing the demographic dividend.

265. The employment situation has been severely impacted by the outbreak of the COVID-19 pandemic. Measures meant to alleviate the spread have resulted in unemployment or underemployment, with 92% of firms having decreased the total number of hours worked per week relative to the period before the outbreak, while 22% have decreased the total number of permanent workers.

Outcomes of Decent Work

266. Decent work has been defined by the International labour Organisation (ILO) as being “productive work for women and men in conditions of freedom, equity, security and human dignity”. It offers opportunities for work that is productive and delivers fair income. Specific targets during NDS1 Period include:

- Increase the level of formal employment from 24% in 2020 to 30% by 2025;
- Reduce precarious employment rate from 19% to 14% by 2025; and
- Increase the proportion of informal sector workers covered by Occupational Safety and Health Services from 0% to 20% by 2025.
Strategies for Decent Work

267. Realisation of decent jobs will be anchored on strengthening implementation of the following four pillars of decent work under the Decent Work Country Programme;
   - Promotion of jobs and income opportunities;
   - Access to social protection;
   - Social dialogue; and
   - Labour standards.

268. Further, Government will prioritise development and implementation of a national action plan to facilitate the transition from informality to formality by the SMEs sector.

269. Social dialogue facilitates cohesion and shared national vision. Accordingly, strengthening of social institutions in order to reduce the country risk factor will be prioritised. Priority will be given to the full operationalisation of the Tripartite Negotiating Forum.

270. Good labour migration governance is essential to promote export of human capital. It ensures that those who elect to work in the diaspora find decent jobs in host countries. During the NDS1 Period, priority will be to develop standard operating procedures for recruitment of Zimbabweans in the diaspora. This will be strengthened by signing bilateral labour agreements to formalise recruitment. Further, initiatives for the portability of social security benefits will be implemented with the compensation of the Ex Wenela mine workers as a flagship programme.

271. In line with the broader strategy of improving compliance with the international labour standards, an electronic labour case management system will be developed to modernise and enhance efficiency of the dispute settlement system.
272. Further, the Labour Inspectorate System will be strengthened to upscale protection of labour rights and promotion of safe work environments. Labour laws will also be reviewed to be in sync with labour dynamics.

273. During the NDS1 Period, coverage of occupational safety and health as well as specialised safety training programmes will be expanded to include the informal sector and the public service.

274. In order to enhance job opportunities during the NDS1 Period, the employment policy will be reviewed in line with findings of the Employment Diagnostics Survey and implementation of active labour market policies will be strengthened.

275. In line with the thrust of economic transformation and allowing private sector to emerge, establishment of incubation hubs, labour intensive public works programmes, remodelling of skills and entrepreneurship development as well as strengthening coordination of employment initiatives will be prioritised.

276. Further, to ensure evidence based programming of employment initiatives, a robust functioning Labour Market Information System will be developed.

Programmes for Decent Work

277. Key programmes under decent work will include;
   - Decent work promotion;
   - Formalisation of the informal;
   - Rural development; and
   - Policy and regulatory framework review.
CHAPTER 4

FOOD AND NUTRITION SECURITY

Food Security

Introduction

278. Food security, as defined by the United Nations' Committee on World Food Security, means that all people, at all times, have physical, social, and economic access to sufficient, safe, and nutritious food that meets their food preferences and dietary needs for an active and healthy life.

279. Access to quality, nutritious food is fundamental to human existence and necessary for human happiness. Secure access to food can produce wide-ranging positive impacts, including economic growth and job creation.

Situational Analysis

280. The agricultural sector, which is responsible for feeding the nation and providing livelihoods to 67% of the country’s population in rural areas is also vital for recovery and growth of the economy.

281. Food insecurity, however, has been consistently growing in Zimbabwe. During the period 2015 to 2020, the proportion of food-insecure rural population ranged between 30 and 59%. Urban vulnerability was also on the rise reaching 30% or 2.2 million people by 2020.

282. Further, the proportion of chronically food insecure people in rural and urban communities increased from about 500 000 in 2015 to about 1.7 million people in 2020. Figure 9 below shows the proportion of food insecure people over the period 2009 to 2019 during the peak hunger period of January – March.
283. Major factors that are driving food insecurity in the country include among others, natural shocks, low skills and knowledge base of farmers, shortage of inputs, low levels of mechanisation, reliance on rain-fed agriculture, limited access to market information and marketing facilities, limited access to finance and limited security of tenure.

**Cereal Production**

284. Over the years, average productivity of both food and cash crops across all farm types has been declining. Maize yields declined from an average of 1.2 metric tonnes per Ha (MT/ha) between the period 1990 to 1995 to an average of 0.749 MT/ha between the period 2010 to 2016.

285. Consequently, the country’s capacity to produce sufficient cereal to meet national consumption requirements has been constrained. The gap has been consistently
met through importing, putting a strain on already limited foreign currency. Figure 10 below shows the country’s cereal production and requirements trends.

**Figure 10: Cereal Production and Requirements Trends**

![Cereal Production and Requirements Trends](image)

*Source: Second Round Crop and Livestock Reports (2000-2020) and ZIMVAC Reports (2002 to 2019)*

**Livestock Production**

286. Livestock herd sizes, nationally, declined by about 20% for beef, over 83% for dairy, and 26% and 25% for pigs and small ruminants respectively, between 2009 and 2020.

287. Furthermore, the productivity of smallholder cattle herds remains very low, with average calving rates of about 45% against a potential of 60%, and off-take rates of about 6% against a recommended 20%.

288. The agriculture sector in general is currently faced with the following challenges: -
- Inadequate Financing;
- Short term Financing (Limited Medium and Long Term Financing);
- High Operating costs (high costs of doing business);
Access to Food

289. The urban population, the vulnerable and food deficit rural households access their food requirements through a private sector dominated food market, whose grain requirements are met by the Grain Marketing Board (GMB)'s Strategic Grain Reserve (SGR).

290. GMB is the sole buyer of grain, supported by existing grain market regulations, pricing policies and subsidies, which are crowding out the private sector and effectively making millers dependent on the SGR against a constrained fiscal space to maintain an adequate SGR stocks. This is being exacerbated by underdeveloped public rural infrastructure and poor rural market linkages, which increase marketing and transaction costs, adversely affecting farmer incomes.

National Outcomes of Food Security

291. The NDS1 seeks to improve food self-sufficiency and to retain the regional breadbasket status. The main objective is to increase food self-sufficiency from the current level of 45% to 100% and reduce food insecurity from the high of 59% recorded in 2020 to less than 10% by 2025.
292. The target is also to increase maize production from 907 629 tonnes in 2020 to 3 million tonnes by 2025 and beef production from 49 115 tonnes in 2020 to 110 000 tonnes by 2025.

293. During the NDS1, food security will be underpinned by the following National outcomes:—
   - Increased food self-sufficiency;
   - Reduced food insecurity; and
   - Increased incomes.

*Key Strategies to Ensure Food Security*

294. In order to achieve food self-sufficient status, the following strategies and interventions will be adopted:

   *Promoting resilience and sustainable agriculture*

295. The process of enhancing agricultural productivity and production is anchored in sustainable production systems. The NDS1 will focus on enhancing the resilience of social-ecological systems to be supported by continuous learning and experimentation.

296. For agriculture, learning and experimentation through adaptive and collaborative management is key in building resilience. The following initiatives will ensure attainment of resilience and sustainable agriculture:—

   *Crops*

   - Upscale and expedite irrigation rehabilitation and expansion utilising existing and new water bodies;
   - Climate Smart Agriculture through adoption of conservation agriculture techniques and principles such as Pfumvudza/Intwasa;
Promote water and input use efficient technologies such as Precision Agriculture;
Develop stress tolerant, high yielding crop varieties;
Promote traditional grains in low potential areas which are climate smart;
Implement commercial contract farming that is led by financial services with Government providing guarantees;
Implement a Commodity Value Chain Financing Model where private sector players are expected to finance up to 40% of their raw material requirements;
Implement a climate proofed Presidential input support scheme that is anchored on the Pfumvudza/Intwasa Concept which adopt conservation agriculture techniques or principles such as minimum soil disturbances and mulching;
Soil fertility management through soil conditioning management practices including liming and manuring;
Diversify food production and consumption moving away from maize to other food crops such as potatoes and cassava;
Capacitate extension services delivery;
Speeding up of mechanisation facilities for the importation of agriculture mechanization equipment; and
Introduce private sector led production and marketing initiatives such as the Hub and Spoke Model for smallholder farmers to promote access to finance, inputs and outputs markets.

Livestock

297. Livestock production plays an important role in the social, cultural and economic environment of Zimbabwe. The NDS1 will prioritise animal health and production through strengthening farmer knowledge, skills in livestock production and health so as to enhance productivity through the following strategies:-

Upscale hay cutting, development of pastures green belts and creation of forage banks;
Promote on-farm feeds formulation using cassava and cow peas to produce survival rations;

Intensify dipping programme and blitz tick grease application to prevent and control entry and outbreaks of animal diseases;

Provide lab diagnostics for confirmation of animal diseases and researches on animal diseases;

Strengthen implementation measures against Tsetse Fly and undertake operational research;

Create livestock business centres for small stocks (goats, sheep, pigs) based on the Hub and Spoke Model;

Strengthen pass on schemes for dairy, and small stock producers;

Increase watering points for livestock;

Establish a national bull centre and semen processing laboratory to strengthen conservation of animal genetic resources and research and develop stress tolerant animal breeds and further promote artificial insemination by cascading the programme to A1 small holder farmers;

Implement financial services-led livestock development initiatives models which gradually phase out Government guaranteed command programme through banks to a wholly private sector driven financing model;

Climate-proof Livestock Production through commercialisation of fish, rabbits, bees and small stock;

Establish breeding and genetic improvement centres and champion farmers, breeding and distribution of improved breeds, targeting export markets, and support surrounding farmers with trained livestock extension officers;

Harmonise collection of levies in order to reduce the cost of compliance in livestock production;

Resuscitate the Cold Storage Commission;

Localise production of livestock inputs and veterinary vaccines and medicine;

Establish a Livestock Information Management and Traceability Systems for disease control and market access; and
Training and capacitation of extension officers.

**Horticulture**

**Situational Analysis**

298. The horticulture sector prior to Fast Track Land Reform Programme (FTLRP) was dominated by large scale commercial growers who committed significant investments in skills development, irrigation infrastructure, handling facilities and export market development.

299. The FTLRP fragmented and dissipated the commercial horticultural sector. Similarly, financial support from investors, banks, private processors, buyers and developed skills dwindled. More significantly, the horticulture cold chain and packaging infrastructure, including overseas markets and logistics were disrupted.

300. Consequently, production fell abruptly and exports declined to US$40 million from a high of around US$143 million in the 1990s. This triggered high absorption of imports and further collapse of the sector.

Key strategies to restructure and re-invigorate the horticulture sector

301. Government, during the NDS1 Period will prioritise implementation of the Zimbabwe Horticulture Recovery and Growth Plan (HRGP). The Plan seeks to reconfigure horticulture industry towards private sector driven, paired with a transformative rural horticulture sub-sector under the Presidential Horticulture Scheme, covering 1.8 million rural households.
302. During the Strategy Period, focus will be on nutrition, income generation and rural agro-industry development. Aggregation of produce from various geographical points will be pursued to create a critical mass for local industrial beneficiation of both indigenous and exotic vegetables and fruits.

303. Further, the following strategies and interventions will be prioritised to revamp the horticulture sector during the NDS1 Period:-

- Improving security of land tenure systems for horticulture producers in order to attract investment;
- Establishing a legal framework that is specific to the horticultural sector in order to curb side marketing of produce under contract schemes;
- Improving Ease of Doing Business in the horticulture sector by reviewing and making export documentation less cumbersome and costly;
- Developing and maintaining a unique competitive brand for Zimbabwe’s horticultural products;
- Promoting the export of value-added horticulture products in order to reduce post-harvest losses and raise export earnings;
- Diversifying and scaling up production of emerging crops such as blueberries, raspberry and macadamia nuts, which have high demand on the export market; and
- To formalise the domestic horticultural markets, for instance Johannesburg Market Model, in major cities like Harare and Bulawayo.

**Increasing Access to Affordable Agriculture Financing**

304. Access to agriculture finance remains key in unlocking the full potential of agriculture and strengthening the food supply system through facilitating the adoption of improved crop varieties and livestock breeds as well as the purchase of other inputs. The agricultural sector’s share of commercial lending has been gradually declining due to the inherent risk of agricultural production, lack of collateral among
smallholder farmers, high transaction costs and limited affordable lines of credit in the country.

305. In order to increase access to affordable agriculture financing, the following strategies will be implemented during the Strategy Period:-

- Establishing an agricultural revolving fund with appropriately structured lines of credit;
- Promoting weather-based agriculture, including the localisation of seasonal weather forecast and weather-based index insurance mechanisms for smallholder farmers;
- Strengthening the use of Public-Private Partnerships;
- Implementing smart subsidies;
- Reviewing contract farming provisions to become more binding and also include timely payments; and
- Establishing a stop-order system to strengthen and promote contract farming to cover all crops and livestock.

*Setting up and adequately capitalising the Land Bank*

306. Government has commenced the process to re-structure, re-model and transform Agribank into a Land Bank. Government has set a deadline of 31 March 2021 for the capitalisation and operationalisation of the Land Bank.

307. The Land Bank is mandated with undertaking expanded banking and financial services provision to all categories of farmers in Zimbabwe (A2, Commercial, A1, Resettled, and Communal farmers), thus underpinning agriculture recovery and productivity.
308. The Government will adequately capitalise the Land Bank so as to deliver on the mandate for agriculture financing and development. The Land Bank will advance short, medium and long term capital for agriculture irrigation and infrastructure.

Promotion of effective agriculture knowledge, technology and innovation systems

309. A well-functioning agriculture knowledge, technology and innovation system, anchored on inculcating the requisite agronomic and animal husbandry practices represents the future of farming particularly in the face of climate change and other disasters such as COVID-19.

310. The NDS1 will ensure that contemporary ameliorative agricultural practices are adopted. The coordination and strategic programming of Agricultural Knowledge and Innovation Services (AKIS) will be strengthened through the following strategies:-

- Linking farmers, research, extension and agriculture education;
- Strengthening agricultural research;
- Training farmers to enhance their effectiveness to support innovations and technology adoption;
- Continuous capacitation of extension workers; and
- Promoting policies and investment that encourage adoption of digital and modern agriculture production and marketing technologies.
- Providing contemporary education in theory and practice of science agriculture through existing Agricultural Colleges and other higher institutions of learning in collaboration with Development Partners; and
- Capacitating the existing Agricultural Colleges and extension workers including motorisation and e-extension and advisory services;
- Developing new crop varieties, planting materials and management technologies;
- Research on the adoption of Genetically Modified Organisms to inform policy decision;
Researching and development for diversification of food consumption focusing on seed multiplication for cassava and sweet potatoes;

Research, development and innovation for indigenous fruits and vegetables to improve capacity for seed multiplication and shelf life;

Up-scaling technical, extension, advisory and coordination services physically and virtually to suit the newly revised Agro-Ecological Zones; and

Establishing a comprehensive Agricultural Information Management System including crop and livestock assessment, livestock information management system, lands information management system.

Agricultural Engineering and Infrastructure Development

311. The NDS1 seeks to promote agricultural mechanisation, farm structures and irrigation technologies and utilisation of existing water bodies as a means to increase crop and livestock productivity and production through the following strategies:

- Intensifying the design construction and rehabilitation of irrigation infrastructure with clearly defined sustainability mechanisms to ensure continuity, further enhance irrigation scheme management and collaborative public service delivery models to irrigation schemes;
- Upscaling innovation and modernisation of agriculture, including ICT-based advisory services; automation of mechanisation and irrigation, and precision farming such as drip irrigation, fertigation and smart greenhouses and use of satellite technology to provide real time information on area under different crops;
- Establish irrigable land regulations to ensure maximum benefits are derived from existing water bodies and surrounding irrigable land; and
- Promote local manufacture of farm implements as well as establishment of mechanisation service providers focusing on repair and maintenance of farm equipment.
Strengthen existing agriculture markets and developing new ones

312. Improving predictability of marketing and trade policies will strengthen existing agriculture markets and the development of new ones during the Strategy Period. This will be buttressed by establishing a well-functioning, regulated warehouse receipt system, combined with a commodity exchange system through which Strategic Grain Reserves will be stocked.

Facilitating access to land and security of tenure

313. A secure land tenure and land administration system is central to a vibrant and productive agricultural sector to deal with illegal settlements, deforestation, land degradation, farm boundary disputes, as well as conflicts between different land uses including mining, forestry, tourism, and urban expansion and halt the loss of productive land to urban developments.

314. The NDS1 will institute the following strategies:-

- Develop a new land policy that harmonises existing laws (statutory and customary), policies and institutional mandates;
- Reform and restructure Agribank in to a Land Bank in order to build confidence in the transferability and bankability of tenure systems and enhance the commercial value of the land;
- Develop adequate legislative and regulatory framework for dispute resolution, compensation, and sharing of infrastructure;
- Strengthen coordination within Government and across other sectors in enforcing land use planning regulations, orderly resettlements and ensuring that maximum farm sizes are adhered to;
- Strengthen service delivery capacity and land information management systems; and
- Land Survey and Mapping.
Global Compensation Agreement

315. To strengthen re-engagement and build confidence in the economy, thus reducing the country’s risk rating, Government signed the Global Compensation Deed with former farmers on 29 July 2020. This is testimony of Government’s commitment to respect for property rights in adherence to the provisions of Section 72 and Section 295 of the Constitution of Zimbabwe.

316. The Agreement provides for payment of compensation for improvements on the land that was compulsorily acquired by the State during the Land Reform Programme. The signing of the agreement represents a major milestone in the restoration of trust and cooperation between the former farm owners and Government.

317. This is expected to boost the engagement and re-engagement efforts aimed at bringing back confidence as well as attract local and foreign investors to take up opportunities in the agricultural, mining, tourism and infrastructural sectors of the economy.

318. As part of the confidence building measures, Government through the Ministry of Lands, Agriculture, Water and Rural Resettlement is in the process of regularising tenure for former farm owners who are still operating on the land with and without tenure documents. These farmers are being issued Offer Letters and 99-Year Leases as security of tenure to enable them to continue operating and contributing to the revival of the agricultural sector.

319. Government is also restoring title to owners of farms protected under Bilateral Investment Promotion and Protection Agreement (BIPPA) and Bilateral Investment Treaties (BIT), as well as indigenous persons whose farms were compulsorily acquired, in accordance with the Land Commission (Gazetted Land) (Disposal in Lieu
of Compensation) Regulations, 2020 SI 62 of 2020. The Government continues to make interim compensation relief payments to the former farm owners, whilst the mobilisation of resources continues for the full settlement of compensation according to the terms of the Global Compensation Deed.

**Improving Access to Food Markets**

320. Over the past year, the strategy to ensure availability and access to food through paying above market producer prices to stock the Strategic Grain Reserve and direct sales to large-scale processors at subsidised prices to lower consumer food prices has had limited success due to fiscal challenges and side marketing.

321. Regional experiences have shown that when designed and implemented effectively, National Food Reserves play an important role in promoting access to food and price stability during disasters and food emergencies.

322. During the NDS1 Period, Government will prioritise the following initiatives to ensure improved food reserves:

- Maintain a diversified Strategic Food Reserves with effective collection and distribution networks;
- Capitalise the Strategic Food Reserve;
- Implement measures that minimise postharvest and storage losses;
- Review the market regulations, floor producer pricing policy and subsidy to millers;
- Establish Rural Assembly Markets (RAM) located in production areas to primarily serve as places where farmers and off-takers can meet and trade their products;
- Pre-season price announcement policy;
- Review and establish general standards for agricultural commodities to meet local, regional and international market requirements;
- Institute legal reforms to support fair and transparent pricing mechanisms, establishment of an Agricultural Commodity Exchange and access to funding through a warehouse receipt system;
Set up of an agriculture market information system that collects and disseminates information on local, national and regional, markets to enhance local production;

Develop policies that promote market linkages and linking farmers to institutions;

Amend legislation to remove element of GMB being sole buyer of grain; and

Revise the SGR policy to address thresholds.

**Enhancing Institutional Restructuring and Coordination**

323. The NDS1 envisages restructuring and capacitation of institutions through Institutional Analysis and the design of a Master Plan for Restructuring Agriculture.

324. In this regard, the NDS1 will focus on the following:-

- Transformation of public institutions and institutional re-orientation to fully undertake mandates;
- Privatisation of some commercial and productive activities which are currently being worked on by Government;
- Strengthening collaboration between the public sector and agro-oriented civil societies to establish a framework for dialogue to enhance the agricultural profession; and
- Setting up national and sub-national structures for coordination including strengthening of existing food security committees.

**Food Security Programmes and Projects**

325. The NDS1 will promote the implementation of the following programmes in order to increase food security:-

- Agriculture Education;
- Crop and Livestock Research and Technology Development;
- Crop and Livestock Production, Extension and Advisory Services;
Agricultural Engineering and Farm Infrastructure Development;
Animal Health and Production;
Agriculture Financing, Economics and Markets; and
Lands, Resettlement and Security of Tenure.

**Irrigation Development and Water Harvesting**

326. The country is targeting expanded irrigation development and water harvesting for enhancing agriculture production and productivity, targeting over 350,000 ha during the NDS1. Among other dams, the following have been earmarked for expanding irrigation development:
- Tokwe – Mukosi
- Gwayi-Shangaan;
- Marovanyati;
- Osborne; and
- Zhove

327. The Irrigation Development Fund will be revived and resources directed towards irrigation development and Irrigation infrastructure rehabilitation.

328. As part of strategies for rural economy activation, as much as 35,000 boreholes will be drilled for rural community water supply, during the NDS1 Period.
Nutrition Security

Situational Analysis

329. The country has demonstrated commitment to addressing nutrition insecurity as reflected by the development and implementation of several national policies and strategies. This has seen significant positive strides being recorded despite high numbers of food-insecure people.

330. However, the country is still facing a triple burden of malnutrition with one out of 3 children suffering from under nutrition, over nutrition and micronutrient deficiency. This is mainly due to gaps in the country’s food system.

331. The majority of households in both urban and rural areas consume mostly cereals; condiments, vegetables, oils, and sugar, which lead to poor dietary diversity and insufficient consumption of essential nutrients.

332. The country grapples with the burden of malnutrition characterised by:
   ▶ Stunting at 26%;
   ▶ Micronutrient deficiencies such as iron-deficiency anaemia; and
   ▶ Vitamin A deficiency and iodine deficiency disorders and obesity.

333. The National Nutrition Survey and the Urban Livelihoods Assessment indicate that, whilst the proportions of children with stunting is less in urban areas than in the rural areas; the trend in urban areas has been increasing.

Nutrition Security Outcomes

334. The following are the outcomes for Nutrition security:
   ▶ To reduce the national prevalence of under-five stunting from 23.5% to 17% by 2025; and
Reduction in the prevalence of iron deficiency anaemia in women of child bearing age from 27% to 13% by 2025.

Key Nutrition Strategies

335. The NDS1 will prioritise public health measures that safeguard proper absorption and utilisation of essential nutrients to prevent nutrient imbalances affecting the Nation.

336. During the Strategy Period, Government will promote consumption of safe, toxin-free, nutritious foods appropriate to dietary needs of gender, age, activity and sociocultural preferences.

337. Further, Government will strengthen food and nutrition awareness on diet diversification with a variety of grains, fruits and colourful vegetables like greens and carrots. This will also involve promotion of exclusive breastfeeding and commercial production of nutrient-rich foods.

338. Up-scaling food fortification to supplement with nutrients, and bio fortification targeting rural areas with restricted market access to fortified or diverse foods will be prioritised during the NDS1 Period.

339. The Food and Nutrition Security Committees at National and Sub National levels will be strengthened to support and coordinate Nutrition specific and Nutrition Sensitive interventions.

Nutrition Security Programmes

340. The NDS1 will promote the following programmes as a strategy to improve the nutritional status:-

- Home nutrition and schools gardening, including traditional vegetables;
- Maternal Micronutrient Supplementation;
Nutrition sensitive social assistance and protection;
Good Manufacturing Practice (from Farm to Fork);
Adapt and Adopt the Complementary Feeding Framework for improving young children's diets;
Implementation of National Food Based Dietary Guidelines (FBDGs) in various sectors – agriculture, health, education; and
Production and consumption of bio-fortification of foods.
CHAPTER 5

STRUCTURAL TRANSFORMATION AND VALUE CHAINS

Introduction

341. The 2030 Agenda for Sustainable Development highlights the importance of structural transformation. SDG 8 is anchored on promoting inclusive and sustainable economic growth, full and productive employment and decent work for all and targets to achieve higher levels of economic productivity through diversification, technological upgrading and innovation, with a focus on high-value added and labour-intensive sectors. The NDS1 endeavours to transform the economy through moving up a number of value chains as well as domesticating these value chains.

Situational Analysis

342. Prior to the year 2000, the country had successfully engineered fundamental shifts in the structure of the economy by reallocating resources from low to high productivity sectors and creating significant formal employment. The contribution of secondary activities to GDP and formal employment rose in 1990 to 25% and 16.5% respectively relative to the primary sector of 22% and 32.6%.

343. Following the decade long (2000-2008) economic crisis and short-lived economic recovery during the dollarisation period, the economy underwent a significant structural regression characterised by deindustrialisation and informalisation. The turbulent macroeconomic environment dominated by high inflation, exchange rate volatility and high cost of doing business, disrupted the previously strong primary-secondary and tertiary sector value chains. Also contributing to the disintegration was high absorption of imports of semi and finished products, particularly during the dollarization period from 2009-2017.
344. Consequently, the contribution of primary and secondary activities to GDP declined from 22% and 25% to 17% and 10.6% respectively. The contribution of services, however, increased from 48% to 66% driven mainly by distribution of imported products.

345. Figure 11 below shows the profile of economic transformation since independence, from 1980-2020.

Figure 11: Structure of the Economy: 1980-2020

Source: Ministry of Finance and Economic Development, 2020

346. Further, the impact of the recent outbreak of COVID-19 has also contributed to structural changes in economic activities, with some sectors such as health services and ICT, benefitting through increased demand and investments whilst tourism, education, manufacturing, mining and transport were negatively affected. Figure 12 below shows the impact of COVID-19.
347. Similar to GDP structural shift, there has been significant changes in the composition of export earnings. By September, 2020, primary commodities, mainly minerals, constituted a significant share of exports as indicated in Figure 13 below. The increased reliance on primary commodities exposes the economy to the vagaries of the international commodity markets.
348. The structural regression did not only manifest in the composition of economic activity but also in the geographical spread of industrial activity. The difficult operating environment led to some companies to either close down or relocate to the capital. This has contributed to the situation where most firms are now located in Harare. As of 2019, about 46% of the total manufacturing firms were domiciled in Harare.

349. Consequently, there has been high de-industrialisation and under development in other towns and rural areas, despite having natural resource endowments that form the critical throughput in the processing industries.

**Transforming the Economy**

350. The process of structural transformation is central to stimulating an inclusive and sustained growth pattern that enable more people to benefit from higher productivity levels in more advanced segments of the economy. During the NDS1 Period, the
broad objective is to rebalance the economy and reverse the structural regression. The goal is to gradually improve the contribution of the secondary sector to GDP from 10.6% in 2020 to 15% by 2025, and the contribution of value added exports to total exports from US$ 727.47 million in 2020 to about US$ 1337.00 million in 2025.

351. Broadly, the key link to structural transformation is value addition and beneficiation of agriculture and mining products. During the NDS1 Period, priority will be to develop and strengthen already existing value chains, beneficiation of minerals and in the process promoting linkage of SMEs with large corporates. The Strategy will also prioritise decentralisation of industrialisation initiatives in line with the policy thrust of Devolution and Decentralisation. Value addition and beneficiation industries will be located in specific provinces and districts where the endowments are located.

352. Successful execution of value addition and beneficiation will be premised on a stable macroeconomic environment characterised by a stable exchange rate and low inflation, availability of key enablers such as transport, power, energy and water as well as a predictable, consistent stable policy environment. Further, sustained availability of primary sector throughput will be key.

**Value Addition**

353. During the NDS1 Period, one of the major outcomes is to improve the performance of the manufacturing sector through value addition. In order to accelerate manufacturing sector performance, the NDS1 will prioritise the following quick win value chains for implementation during the Strategy Period:

- Agro-based value chain;
- Pharmaceutical value chain;
- Bus and Truck assembly value chain;
- Iron and Steel and General Engineering value chain; and
- Plastic waste value chain.
Developing and Strengthening Agro Based Value Chains

354. There is a strong link between agriculture and the rest of the economy, with growth multipliers of 1.5% to 2.7%. The Agriculture sector provides over 60% of raw materials as throughput into manufacturing. At the same time, manufacturing sector also provides inputs to the agriculture sector in the form of fertilisers, chemicals, implements and other inputs. The local linkages have been weakened with most of the raw materials to manufacturing now being dominated by imports. In most cases, the country has high-underutilised capacity in the agro-processing value chain system.

355. In order to strengthen local agro-processing value chains, the Strategy will leverage on existing processing capacity and potential throughput from agriculture. Given various value chains, priority during the NDS1 Period will be on the development of the following:

- Soya bean value chain;
- Fertiliser value chain;
- Cotton value chain;
- Sugar Cane to Fuel Value Chain. This is a complex product value chain which can have a macro wide income impact to the economy;
- Dairy value chain; and
- Leather value chain.

Soya Bean Value Chain

356. Soya bean is a strategic crop with multiple use value as a food, cash, industrial raw material and soil-improving crop. The country has an estimated oil seed crushing capacity of 610 000 mt per annum which is sufficient to satisfy domestic demand for cooking oil. Notwithstanding the capacity, there is over reliance on imported soya bean and crude oil due to lack of sufficient throughput from local agricultural production.
Improving performance of the Soya Bean Value Chain

357. Enhancing the soya bean value chain is key in underpinning the country’s food and nutrition security, import substitution and generation of jobs. In this regard, the objective of the NDS1 will be to strengthen the value chain and the following key performance indicators will be tracked:

- Increase local soya bean throughput from 60 000mt in 2020 to 300 000mt by 2025; and
- Increase crushing of soya bean from 60 000mt in 2020 to 300 000mt by 2025.

Strategies to improve performance of the Soya Bean Value Chain

358. In order to increase local soya bean throughput into oil and stock-feed manufacturing, Government will promote soya bean production through contract farming arrangements involving the private sector.

Fertilizer Value Chain

359. The fertilizer value chain used to be strong with linkages running from phosphate mining, fertilizer production, and supply to the agriculture sector. The fertilizer industry has an annual production capacity of 1.5 million tonnes of Compounds and Blends and 90 000 tonnes of Ammonium Nitrate (AN). National demand stands at 600 000 metric tonnes, with 350 000 metric tonnes being compounds and 250 000 metric tonnes constituting Ammonium Nitrate.

360. Notwithstanding the abundant phosphates deposits, available fertilizer manufacturing capacity and high demand for fertilizer, the value chain has gradually deteriorated due to low capacity utilisation, low off take of fertilizer, influx of imports, inadequate foreign currency, inadequate working capital, old technology, electricity shortages, among others factors.
361. Current Production Capacity for phosphates stands at 80 000 metric tonnes, while actual production is 60,000 metric tonnes, leaving an idle capacity of 20 000 metric tonnes. AN Production Capacity stands at 90 000 metric tonnes against an actual production of 30 000 metric tonnes, with an idle capacity of 60 000 metric tonnes. Over the past seven (7) years, Zimbabwe has spent US$662 million importing fertilizers.

362. There is therefore need to promote local production and domesticate value chains to reduce the import bill, ensure food security and job creation. Government, during NDS1 will support local fertilizer production to complement agriculture recovery, save foreign currency and generate employment.

*Improved Performance of the Fertilizer Value Chain*

363. The objective under fertilizer value chain is to enhance linkages from phosphates mining, fertiliser manufacturing and uptake in the agriculture sector. Specific targets include the following: -

- Increase production of phosphates from the current 60 000 metric tonnes to 100 000 metric tonnes by 2025;
- Increase production of ammonium nitrate from the current 30 000 metric tonnes to 240 000 metric tonnes by 2025;
- Reduce importation of phosphates by 22% from the current 180 000 metric tonnes to 140 000 metric tonnes by 2025;
- Reduce importation of AN from the current 220 000 metric tonnes to 11 000 metric tonnes by 2025; and
- Increase locally manufactured fertilizer uptake in agriculture from 30% to 70% by 2025.
Strategies to improve fertilizer value chain

364. The main raw materials for basal fertilizer are locally produced at Dorowa mine hence there exist great opportunities for import substitution if the local value chains are strengthened. In this regard, the NDS1 will prioritise the following strategies to strengthen the phosphate – to – fertilizer value chain:-

- Recapitalisation of fertilizer manufacturing companies;
- Timely orders of fertilizer for Government agricultural Programmes complemented by early disbursements of funds to manufactures, particularly during the first quarter of the year to afford ample time for production;
- Investment in new technologies in fertiliser manufacturing; and
- Promote local uptake by placing Government orders with local manufacturers.

Cotton Value Chain

365. The cotton value chain provides economic and livelihood synergies through vertical and sideway linkages with the textile, apparels, yarn, fabric, oil processing, and stock feed among other industries.

366. However, the value chain has been affected by low uptake of cotton into the value chain due to antiquated machinery, outdated technology and emergence of competing alternatives such as synthetic fibres. There is a huge gap between throughput and value-added cotton. The uptake of cotton into the local value chain stands at 9000mt against throughput of 75000 mt of cotton. The balance is being exported.

Improving performance of Cotton Value Chain

367. In order to improve the performance of the cotton value chain, the NDS1 will prioritise the following:-

- Increase cotton uptake from 9000mt to 15 000mt by 2025;
Increase production of yarn from 6,750 mt to 11,250 mt by 2025; and
Increase production of fabric material from 30% in 2020 to 50% by 2025.

Strategies to improve Performance of the Cotton Value Chain

368. During the NDS1 Period, the following strategies will be implemented:

- Attract new investors in the Cotton Value Chain;
- Promote the manufacture of explosives from cotton lint as a complex product with high value;
- Establish the cotton value chain retooling revolving fund;
- Promote of use of 100% cotton fabric in the production of apparels; and
- Strengthening antidumping measures to reduce the influx of second hand clothes.

Dairy Value Chain

369. The dairy sub-sector has high local content, but requires heavy investment. The production of raw milk is below the national demand which stands at 130 million litres against production of 70 million litres per annum.

370. Challenges being faced manifest in the form of low milk volumes and lack of viability. At farmer level, the most significant constraints include lack of proper dairy breeds, failure to access and afford stock feed, poor access to markets and related infrastructure and limited access to investment funds. During the NDS1 Period, raw milk supply gap will be reduced, thus reducing the import bill.

Improving performance of Dairy Value Chain

371. The following key performance indicators will be tracked during the Strategy Period:

- Increase the dairy herd from the current level of 16,000 to 30,000 by 2025;
Increase production of raw milk from the current level of 70 million litres to 130 million by 2025; and
Increase raw milk uptake by processing companies from the current level of 70 million litres to 130 million by 2025.

Strategies to improve performance of the Dairy Value Chain

372. The following strategies will be implemented to improve performance in the dairy value chain:-
- Continued implementation of the Dairy Revitalisation Programme to increase the milk herd funded by a voluntary levy on cheese and butter imports;
- Manage importation of milk powder and promote local raw milk production; and
- Support Upgrading and Modernisation Program for existing firms.

Leather Value Chain

373. The leather value chain was well structured prior to the economic challenges of the past two decades. The leather value chain starts from livestock production and animal husbandry, abattoirs, hides and skins merchants and traders, tanneries, manufacturers and retailers. Collaboration along this structure is weak and this has led to poor performance.

374. The sector is presently characterised by low uptake of raw hides by tanneries who are operating at less than 10% capacity utilisation. The major up takers of leather are small companies who are producing leather products.

Improving the performance of the Leather Value Chain

375. During the Strategy Period the thrust will be on revitalising the leather sector in order to:
Strategies to improve the Performance of the Leather Value Chain

376. The following strategies will be implemented to facilitate the revitalisation of the leather value chain:-

- Create a leather value chain Apex Body;
- Enhance the application of sustainable production technologies;
- Develop policies and legal frameworks for transformation of the leather sector;
- Facilitate procurement of production machinery for rural SMEs; and
- Develop mechanisms to increase the national herd.

Iron and Steel and General Engineering Value Chain

377. The steel manufacturing industry in Zimbabwe has been dormant for the past two decades mainly due to the closure of the Zimbabwe Iron and Steel Company (ZISCO) and other foundries as a result of a plethora of challenges. ZISCO used to be the main feeder of the foundries. Giant steel processing companies also went dormant. Zimbabwe ended up exporting scrap and in turn steel imports began to surge undermining the policy of domestic value addition.

378. In addition to the closure of ZISCO, various foundries went under mainly due to inadequate electricity and foundry coke, which are key requirements in the foundry industry.
Improving performance of the Iron and Steel and General Engineering Industry

379. During the Strategy Period, Government will take deliberate efforts to support the Iron and Steel and General Engineering Industry in order to achieve the following:-
- Increased availability of locally produced iron and steel products; and
- Increased processing of scrap metal.

Strategies

380. The following strategies will be implemented in order to resuscitate the iron and steel and general engineering industry:-
- Secure investors in the iron and steel industry;
- Resuscitate steel foundries and use of modern technologies in the sector;
- Process scrap metals into new steel products;
- Strictly controlling scrap metal exports to ensure adequate throughput to domestic foundries;
- Promotion of manufacturing of steel billets from scrap metal;
- Facilitate increased supply of coal and electricity to the iron and steel industry;
- Enhance coke production for local foundries; and
- Resuscitate the machine tools and accessories manufacturing subsector.

Pharmaceuticals Value Chain

381. Presently, Zimbabwe is largely dependent on imported medicines, a significant proportion of which is procured and donated by international agencies. Local manufacturers produce 10% of the pharmaceuticals whilst 50% is imported and 40% is donated. All pharmaceutical companies are involved in the formulation of finished medicines from imported Active Pharmaceutical Ingredients (APIs) and excipients to produce generics mainly in oral solid and liquid dosage forms.
382. However, the local industry has capacity to increase market share to 60% of the essential medicines during the Strategy Period.

Improving performance of Pharmaceutical Value Chain

383. The availability of locally produced medicines is critical in ensuring sustainability of health care. In this regard, the NDS1 will pursue the following: -

- Increase the number of locally produced Essential Medicines from 30% to 60% of the essential medicines list by 2025;
- Increase the proportion of companies complying with international WHO good manufacturing standards from 25% in 2020 to 50% by 2025; and
- Reduce the medicines import bill from US$ 220.4 million in 2020 to US$ 100.4 million by 2025.

Strategies to improve performance of Pharmaceutical Value Chain

384. Realisation of an improved pharmaceutical value chain will be realised through the implementation of the revised “Sector Development Strategy for Pharmaceutical Manufacturing in Zimbabwe 2017-2022”. This strategy will in addition to addressing the components of the sector strategy include the following: -

- Promote public procurement of locally produced medicines;
- Monitoring the sourcing of locally manufactured medicines using the Electronic Logistics Management Information system (e-LMIS);
- Re-capitalization of the Pharmaceutical Industry;
- Enhance the competitiveness of the Pharmaceutical Manufacturing Associations and its members
- Facilitate industry, academia and indigenous knowledge systems collaboration on developing formulations for new products and establishment of Bioequivalence (BE) centres;
Establish a system of monitoring date of expiry of Patent rights, not only for pharmaceuticals but all patented products;
- Reduction of registration timelines by Medicines Control Authority of Zimbabwe (MCAZ) and special exemptions for locally produced medicines;
- Harmonisation of the Public Health Policy and Industrial Development Policy;
- Capacity building of key public institutions, including MCAZ, schools of Pharmacy and AiBST;
- Export driven growth leveraging on regional pharmaceutical deficit, regulatory harmonisation, market proximity and SADC Free Trade Area; and
- Review the list of medicines requiring import licenses in line with domestic production capacities.

Plastic Waste Value Chain

385. Plastic waste can be turned into valuable manufactured products and create value chains, new jobs, a better environment, generate tax revenues and savings on imports.

386. Zimbabwe has an underdeveloped petrochemical industry, which ordinarily emerges from oil or gas refineries. As a result the country imports large volumes of polymers used in the manufacture of plastic packaging materials, chemicals and resins for the manufacture of various plastic based products.

387. In the same vein, Zimbabwe disposes significant volumes of plastic waste every year, which are not biodegradable.

388. During the NDS1, Government will promote ventures which convert plastic waste into recycled plastic products through targeted incentives. In addition, the recycled plastic materials will also be used to manufacture other high value products such as housing for LED lighting bulbs.
389. These measures will reduce imports of plastic granules which are widely used by the local industry, create employment opportunities and stimulate sub sector manufacturing entities.

**Truck and Bus Manufacturing and Assembly Industry**

390. The public and commercial transport sector has been undergoing transformation with a focus on improving inter and intra city travel. The major bus manufacturing companies in Zimbabwe have idle capacity which can be used in the production of buses and delivery trucks.

391. Over the past two years, the country has imported over US$70 million worth of public buses and delivery trucks taking advantage of a lower duty regime. This has drained the country of the much needed foreign currency to the detriment of local manufacturers.

392. This is despite local industry having capacity to competitively produce 65 such buses and 100 delivery truck per month with a local content of over 50%. During the Strategy Period, the main objective will be to support local industry to increase the supply of domestically manufactured buses and delivery trucks. This will benefit upstream industries that provide inputs such as bolts, batteries, steel sheets, tyres, upholstery, paint, carpet manufacturers, among others. This will also align to the requirements of the African Continental Free Trade Area of a threshold of 35% local content.

393. In addition to local production of buses, a strategy to enhance local assembly of private vehicles will be developed. Once implemented this strategy will have far reaching impact in terms of job creation and reduction of import bill spent on new and recycled vehicles and accessories.
**Improved Supply of Domestically Assembled Buses and Deliver Trucks**

394. During the Strategy Period, Government will take deliberate measures to facilitate the domestic assembling of buses. The following key performance indicators will be tracked in order to measure progress:-

- Increase the number of locally produced buses from 16% of total new buses in 2020 to 60% in 2025.
- Increase the number of locally produced delivery trucks from 4% in 2020 to 40% by 2025;
- Reduce the import bill on buses and delivery trucks by 44% and 36% respectively by 2025;
- Increase the number of people directly employed in the production of buses and trucks from less than 50 in 2020 to over 4 500 by 2025.

**Strategies to Support the Domestic Assembling of Buses and Trucks**

395. During the NDS1 Period, measures will be put in place to utilise the idle capacity for the production of higher capacity buses and delivery trucks, which are cost effective, through implementation of the following strategies:-

- Government to prioritise procurement of locally manufactured buses and trucks;
- Enhance strategic partnerships with financial institutions to mobilise financial resources based on guaranteed order book;
- Facilitate re-tooling;
- Encourage importation of Completely Knocked Down (CKD) and Semi Knocked Down (SKD) assembly kits through removal of import duties; and
- Manage the importation of buses.
Situational Analysis

396. Zimbabwe has a large, world-renowned endowment of mineral deposits. Despite having more than 40 minerals whose commercial viability has been demonstrated over the past years, Zimbabwe mainly exports unprocessed mineral ores, disadvantaging the nation in terms of jobs creation and enhanced revenue generation. Most mineral beneficiation facilities either lie idle or are underutilised. These include Fidelity Printers and Refiners, Alaska Copper refinery, Bindura Nickel Corporation refinery and Kwekwe Roasting plant.

397. Although the mineral commodities have over the years been generating over 60% of the country’s total exports, much of the sector’s contribution towards socio-economic development can be enhanced through mineral beneficiation and value addition.

398. In pursuance of investments in the mining sector, a basic and transparent cost-benefit analysis of such investments will be undertaken in order to minimise environmental damage, as well as ensure that local mining communities directly benefit and future generation do not inherit the cost incurred by the current generation.

399. In addition, inclusive and sustainable mining sector investments has the potential to catapult the country’s ability to meet the UN Sustainable Development Goals.

400. NDS1 aims to enhance mineral beneficiation and value addition through creation of value chains to anchor the national reindustrialisation policy, SADC Protocol on Mining and the Africa Mining Vision. The local mining sector will enhance its beneficiation and value addition strategy through five key minerals namely Gold, PGMs, Diamonds, Coal, and Chrome.

401. Mineral value chains will play a crucial facilitation role towards national reindustrialisation to build a strong integrated economy. The key performance targets during the NDS1 are as follows:-

Mineral Beneficiation
• Number of gold service centres established from one (1) to fifteen (15).
• Level of completion of at least one Base Metal Refinery (BMR) from zero to 100%.
• Increase in the volume of cut and polished diamonds from 0.5% to 5% total production.
• Increase in the number of coal-to-coke processing plants established from five (5) to ten (10).
• Increase in the number of chrome ore-ferrochrome beneficiation plants established from six (6) to eleven (11).

402. In order to realise maximum value from the mineral beneficiation during NDS1, Government will target the following mineral value chains:-

• Gold ore to bullion processing;
• Diamond cutting and polishing;
• Base metals (nickel, copper, iron, cobalt) recovery from PGMs;
• Coal to Coke; and
• Chrome to ferrochrome.

Processing of gold ore to gold bullion for small scale miners

403. A considerable number of Artisanal and Small Scale Miners (ASMs) are involved in gold mining. Gold accounts for more than 30% of total mineral exports and has historically been the bedrock of mining and national socio-economic development. Several refractory gold deposits currently lie idle due to unavailability of the requisite processing technology. These include Tiger Reef Mine, Indarama Mine and Bell Riverlea Mine.

404. Small scale miners lack the financial and technical capacity to set up gold processing facilities. Custom milling service centres, although numerously dotted around the country, charge high processing fees leaving the small scale miners unable to break even.
405. Centralised gold service centres will be established during the NDS1 Period and the small-scale miners will be capacitated through the Mining Industry Loan Fund (MILF) to reduce use of mercury through a structured national program, in line with the Minamata Convention.

406. During the NDS1 gold bullion deliveries to FPR by small scale miners will be increased from 15 tonnes to 24 tonnes by 2025.

Strategies to improve gold ore processing for small scale miners

407. The following strategies will be implemented during the NDS1:-

- Increase the establishment of gold service centres from 1 to 15 in the eight mining districts;
- Reprocess the Kwekwe Roasting Plant Dump to unlock the gold interlocked in the dump;
- Resuscitate the Kwekwe Roasting Plant to facilitate reopening of closed gold mines with refractory deposits;
- Enhance capacitation of small scale miners through the Mining Industry Loan Fund (MILF);
- Expedite clearance of mining title applications backlogs to facilitate new entrants and increased production complemented by implementation of the “use-it-or-lose-it” principle;
- Review and amend the Gold Trade Act;
- Develop and implement a national Mercury Management Program for Artisanal and Small Scale gold miners funded by GEF; and
- Formulate and implement the Artisanal Small Scale Gold Mining (ASGM) Policy to facilitate enhanced exploitation of gold deposits.
Diamond cutting and polishing

408. Zimbabwe is host to a large number of diamond deposits. Currently, 20 local companies are licensed to cut and polish diamonds. Whilst 10% of all locally produced diamonds are earmarked for local beneficiation, only about 0.5% are being cut and polished in the country.

409. Cut and polished diamonds are estimated to bring about 8% increase in value compared to exportation of raw diamonds, hence, the NDS1 will seek to increase the level of locally cut and polished diamonds from 0.5% to 5% by 2025.

Strategies to enhance locally cut and polished diamonds

410. The following strategies will be implemented during the NDS1 Period:
- Review and improve the licencing process for diamond cutting and polishing;
- Review the licence application fees, renewal fees and tenure of the licence to be regionally and internationally competitive; and
- Promote locally cut and polished diamonds through MMCZ to regional and international markets to enhance market penetration.

Setting up of Base Metal refinery

411. Zimbabwe currently has three PGMs producers, namely Unki Mines (Pvt) Limited, Zimplats and Mimosa Mining Company. Several other companies are either at exploration or mine development stages. These are Great Dyke Investments, Karo Platinum and Todal Mining Limited. Unki Mines (Pvt) Limited and Zimplats have smelting facilities producing matte, whilst Mimosa produces concentrates. Figure 14 below shows the various levels of beneficiation in the PGMs sector.
412. Presently, PGMs constitute the major foreign currency earner, contributing about 40% of all mineral exports. During the NDS1 Period, priority is to move up the PGMs value chain from concentrates and matte to Base Metal Refinery (BMR) stage, where copper, nickel and cobalt will be produced.

413. Moving up the value chain will ensure Zimbabwe benefits more from the PGMs through job creation and foreign currency earnings. Establishment of a Base Metal Refinery enhances economic activity through services provision, skills upgrade, technology transfer and infrastructure development to service the BMR processes. The level of completion in establishing the Base Metal Refinery from 0 to 100%, will be tracked during the NDS1 Period.

*Strategies for establishing a Base Metal Refinery*

414. In order to successfully establish the Base Metal Refinery, the following strategies will be implemented during the NDS1:-
• Re-introduction of a beneficiation tax to dissuade exportation of concentrates and matte; and
• Ensure adherence to set timelines for the establishment of the BMR.

Processing of Chrome to ferrochrome

415. The country hosts the world's second biggest resource of chrome ore deposits. The chrome deposit grade is of high quality, best suited for metallurgical processes such as steel manufacturing. However, most of the chromite is exported as ore prejudicing the nation of jobs, and critical linkages for the setting up of downstream and other side stream industries connected to chrome beneficiation.

416. The establishment of ferrochrome processing plants will enhance job creation initiatives, generate more foreign currency earnings and catapult the nation towards steel manufacturing, which is the ultimate stage of chromite value addition.

417. Due to the energy intensive nature of ferrochrome smelters, small scale miners who constitute the bulk of chrome producers lack the financial capacity to install chrome smelters. During the NDS1 Period, focus will be on increasing ferrochrome processing facilities from six to eleven by 2025.

Strategies to establish ferrochrome processing facilities.

418. The following strategies will be implemented during the NDS1 Period:

- Avail land for setting up of chrome beneficiation facilities by prioritising issuance of chrome concessions to companies planning to establish integrated chrome mining and ferrochrome smelters;
- Facilitate the availability of adequate feed to local ferrochrome producers by capacitating small scale chrome producers and minimising export of raw chrome; and
- Export market development for ferrochrome.
Processing of Coal to Coke

419. The country hosts huge coal deposits with potential to produce coking coal and thermal coal. There are 5 coal-to-coke processing plants currently in the country. The country mainly exports unprocessed coal. Exporting coke and coke products has potential to generate increased revenue to the nation. During the NDS1 Period, more coal-to-coke processing plants will be established to enhance revenue generation and job creation.

Strategies to establishing coal-to-coke processing plants

420. The following strategies will be implemented during the NDS1 Period :-

- Facilitate availability of adequate feedstock to coke ovens prior to exportation of coal;
- Expedite the establishment of coke oven batteries through provision of land and expediting processing of mining title applications; and
- Promote setting up of coke oven batteries as a prerequisite to the issuance of coal mining title.

Coal Bed Methane Gas Value Chain

421. Success in harnessing energy from vast deposits of coal bed methane gas deposits, can be a game changer to Zimbabwe, a country in great need of a variety of petrochemical outputs, urea, pharmaceuticals, solvents, polymers and other complex products which can be manufactured from methane gas.

422. Exploration of coal bed methane gas resources, which are the largest in the region will require extensive involvement of Government, investors and tertiary institutions. However, exploration of the resources has encountered numerous false starts.
423. During the NDS1, a methane gas extraction and development programme as well as measures to develop the related value chains will be vigorously pursued.

*Rare Earth Mineral to Complex Products Value chains*

424. Zimbabwe has a large endowment of rare earth minerals, which have not been fully explored.

425. Rare earth minerals can create high income global value chains linkages. This can bring into the country new investments and technologies which can have a ripple effect on the economy.

426. In addition, substantial technology transfers can impact positively Zimbabwe’s innovations hubs in various universities and tertiary institutions.

427. Figure 15 below shows a table of economic transformation which can arise from industrial processing and production of goods and services from rare earth resources such as neodymium, lanthanum, cerium, praseodymium and gadolinium, among others.

*Figure 15: Rare Minerals Value Chains*

<table>
<thead>
<tr>
<th>Rare Earth Mineral</th>
<th>Uses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neodymium</td>
<td>Used in the manufacture of powerful magnets, computer hard drives, wind turbines and hybrid cars</td>
</tr>
<tr>
<td>Lanthanum</td>
<td>Used in the manufacture of carbon lighting applications such as cameras and telescope lenses</td>
</tr>
<tr>
<td>Cerium</td>
<td>Used in the manufacture of catalytic convertors and some crude oil refining</td>
</tr>
<tr>
<td>Praseodymium</td>
<td>Used in the manufacture of aircraft engines and special glasses</td>
</tr>
<tr>
<td>Gadolinium</td>
<td>Used in X-ray and MRI scanning systems and manufacture of refrigerators which do not emit greenhouse gasses such as CFC’s or chlorofluorocarbons</td>
</tr>
<tr>
<td>Yttrium, Terbium,</td>
<td>Used in the manufacture of memory chips for computers, televisions and other visual display devices, which different colours. Europium was also important in the manufacture of control rods used in nuclear reactors.</td>
</tr>
<tr>
<td>Europium</td>
<td></td>
</tr>
</tbody>
</table>
428. Products manufactured from rare earths will result in the launch of Zimbabwe’s complex product exports which correlate with high income per capita. Given the complex technology required, the thrust during the NDS1 Period is to create preparatory work by prioritising the formulation of Rare Earth Mineral Policy.

Programmes to support the Minerals Beneficiation

429. The following Programmes will be implemented to support Minerals Beneficiation:-

- Strategic promotion of mining development, Mineral Beneficiation and value chain creation (over-the-counter exchange to fund the ASM sector);
- Enhanced Mining Research and adoption of ICTs (Computerised Mining Cadastre Information Management System);
- Enhanced Mineral Resource Governance;
- Improved Compliance and Risk Management;
- Improved Mining Title Management;
- Mining Performance Management (Use it or lose it principle); and
- Effective Provincial Administration in mining.

Improving linkage of the Services Sector with Productive Sectors

The distribution sector, which includes wholesale and retail trade, represents the bulk of internal trade and serves as a major link between consumers and producers. However, the country’s distribution sub-sector is largely import dependent which presents weak linkages with domestic productive sectors whilst exerting pressure on the country’s Balance of Payments position.

430. In order to realise the aspirations of the NDS1 of import substitution and domestication of value chains, there will be an aggressive campaign towards locally produced products, targeting to increase the proportion of shelf space occupied by local basic products to at least 80%.
Strategies to improve domestic trade

431. During the Strategy Period, the following strategies will be implemented in order to boost domestic trade: -
   - Promotion of Buy Zimbabwe Campaign;
   - Capacitate and Strengthen the National Competitiveness Commission to enhance national competitiveness;
   - Implement the National Quality Infrastructure Project for Zimbabwe;
   - Enforcement of the Competition Act and the Consumer Protection Act; and
   - Effective regulation and monitoring of legal metrology.

Enhancing Competitiveness

432. The target under the NDS1 is to improve both the Global Competitiveness and Ease of Doing Business rankings to below 100.

433. To realise the milestones, focus will be on reviewing business regulations and doing business procedures. Further, priority will be to undertake skills audit and address the gaps. The National Competitiveness Commission will also produce a periodic industrial competitiveness index in order to closely monitor local progress.

SMEs Development and Rural Industrialisation

434. The country’s manufacturing sector has declined over the past 20 years resulting in de-industrialisation and this has seen the emergence of the SMEs across key productive sectors, including manufacturing and mining.

435. Despite the significant dominance of SMEs in the sector, they have been facing a myriad of challenges that include limited access to finance, inadequate and costly workspaces, lack of proper technologies and machinery, inadequate skills among
others, resulting in the high cost of doing business and informalisation of the manufacturing sector.

436. Support and development of the SMEs will be critical to achieve targets for the manufacturing sector and will also promote rural industrialisation. Competitive advantages of all Provinces in the country will be utilised during the implementation of this Strategy and decentralisation of economic activity from major cities and towns will be pursued.

437. During the NDS1 Period, Government will support SMEs to improve production capabilities with a view to reduce poverty and increase incomes, both in rural and urban areas of the country.

*Increasing performance of SMEs in the Production of Value Added Products*

438. The thrust under the sub-sector will be to increase linkages of SMEs ‘anchor’ companies in all the value chains and promote investments in the marginalised areas. Specific targets include the following:-

- Increase the percentage contribution of SMEs in volume of manufacturing index by 10% annually for the period 2021 to 2025;
- Increase the number of SMEs in the manufacturing sector by 15000 in the period 2021 to 2025;
- Increase the number of SMEs in the manufacturing sector operating in the rural areas by 5000 from 2021 to 2025.

*Strategies to Increase Performance of SMEs in the Production of Value Added Products*

439. During the NDS1 Period, Government will support SMEs to improve production capabilities with a view to reduce poverty and increasing incomes, both in rural and urban areas of the country through:-
Specialised training for SMEs in Business Process Re-engineering, product development, standardisation and certification and other production related training;

- Provision of funding for working capital and production machinery at concessionary rates;

- Provision of appropriate and affordable infrastructure;

- Engage development partners to assist SMEs with machinery;

- Development of innovation hubs and clusters in the Provinces to aid rural industrialisation;

- Implement one village, one product concept;

- Provision of incentives for the development of a one village, one product concept; and

- Enhance participation of SMEs in public procurement.

440. In order to promote value chains, Government will also implement the following programmes during the Strategy Period:

- Industrialisation;

- Consumer Protection Standards and Quality Assurance;

- Economic Empowerment;

- Mineral Beneficiation;

- Competitiveness;

- Local Content Strategy;

- Harnessing Diaspora Investment; and

- SMEs Development.
CHAPTER 6

INFRASTRUCTURE, UTILITIES AND DIGITAL ECONOMY: THE ECONOMIC GROWTH ENABLERS

Introduction

441. The quality of infrastructure in an economy is a measure of the quality of life of the citizens in a country. Further, the amount of a nation’s infrastructure has an important bearing on sustainable long-term economic growth.

Infrastructure and Utilities

Situational Analysis

442. The past two decades have been marred by economic challenges, which led to difficulties in ensuring the continuous rehabilitation and maintenance of infrastructure including expansion of critical areas.

443. Infrastructure in Zimbabwe has been deteriorating over the last two decades. This has resulted in Zimbabwe being ranked number 127 out of 138 countries in the Infrastructure Index under the 2017-2018 World Economic Forum Global Competitiveness Report.

444. The decline in the infrastructure stemmed from numerous factors, including the following: -

- Inadequate levels of public expenditure for routine and periodic maintenance including maintenance and rehabilitation of the infrastructure networks;
- Lack of an integrated approach in infrastructure investment planning compounded by substantial loss of skills;
Lack of progress in building institutional capacities for management and regulation of the basic services;
- Low investment in infrastructure by both public and private sectors;
- Inadequate funding for capital and operating expenditure;
- Low levels of support from Development Partners due to arrears among other challenges;
- Capacity constraints in managing the whole project cycle including weak implementation capacity;
- Unviable utility charges which make it difficult for institutions to re-invest in infrastructure;
- Weak monitoring and evaluation mechanisms; and
- Limited foreign and domestic investment.

445. The deterioration in the country’s basic infrastructure has had serious impact on productive sectors of the economy and on the level and quality of services to the public at large.

446. During the NDS1 Period, efficient infrastructure delivery will be key in the realisation of National Priorities and overall socio-economic development.

447. This will involve restoration of basic infrastructure services such as roads and expansion in critical areas mainly targeting key sectors of energy, transport, water and sanitation, Information and Communication Technology and Housing.

448. The targeted infrastructure sector outcomes in the Strategy will be underpinned by clearly defined and realistic sector strategies and interventions, including performance indicators geared towards ensuring restoration of basic infrastructure services that contribute meaningfully to economic growth and development.

449. Public Investment Management capacity building programmes will also be undertaken for implementing agencies involved in infrastructure delivery to improve efficiency and effectiveness in the execution and achievement of sector outcomes.
Provision of Improved Infrastructure and Services

Strategies

450. The infrastructure and utilities priority area is comprised of Energy, Water & Sanitation and Transport sectors.

451. In order to achieve improved infrastructure and access to services, the following strategies will be implemented:-

- Maintaining and repairing existing infrastructure and equipment;
- Completing on-going and stalled projects;
- Attract FDI in infrastructure;
- Up-scaling Private sector investment in the provision of public infrastructure;
- Promoting facilities that cater for people with disabilities;
- Promoting research and development in infrastructure;
- Capacitating implementing agencies;
- Designing and implementing climate proofing and resilient infrastructure; and
- Promoting infrastructure sharing.

Energy Supply

452. The availability of reliable power supply is a basic requirement for all Zimbabwean citizens. In this regard, improved access to energy supplies is fundamentally important for all other industrial and domestic services.

453. Under the NDS1 Period, priority will be on development of reliable, adequate, low priced power. An efficient and viable energy sector will ensure economic stability and growth, given the forward and backward linkages with the rest of the economy.
454. Despite modest interventions in the sector, the country continues to experience significant electricity shortages, mainly due to aged infrastructure dating back to 1950s that has lacked sustained maintenance and upgrading.

455. Consequently, the national electricity access rate is around 41% and a significant urban-rural disparity exists. About 80% of the rural population lack access to electricity.

456. Overall dependency on hydro power amidst effects of climatic change is exerting more burden on current electricity supply. The reliance on power imports on the backdrop of regional shortages is also not sustainable.

457. During the NDS1 Period, in order to ensure improved energy supply the objective is to increase power supply from the current installed capacity of 2317MW to 3467 MW by the year 2025 and construction of additional 280km of transmission and distribution network by 2025.

458. This energy supply position would mean that there will be no more energy imports by 2025.

Strategies to increase energy supply

459. Key strategies under the NDS1, which are geared towards increasing energy supply include the development of an Integrated Energy Resource Master Plan, completion of ongoing energy projects as well as construction of new energy generating capacity and upgrading, rehabilitation and maintenance of the existing energy infrastructure.

460. In order to increase private sector participation in electricity generation, Government will promote Independent Power Producers.
461. To drive up efficiencies, priority will be to scale up regional integration and power purchase agreements across SAPP members.

462. Further, during the NDS1 Period, diversification of the energy mix through promotion of other sources of energy such as renewable source, methane among others will be prioritised. This will be supported by performance monitoring and research on energy supply and utilisation.

463. Additionally, the Fuel Distribution Nodal System will be developed to ensure that under serviced areas have improved access to fuel service stations.

464. Implementation of new projects will be consistent with the Energy Resource Master Plan that will be developed during the Strategy Period.

**Access to Modern Energy**

465. The country lies at the epicentre of the SAPP transmission grid, with most of the power coming from the north and to the south being wheeled through the ZETDC network.

466. However, the current capacity of transmission and distribution network is not coping with demand and is limiting access to electricity by domestic and industrial users.

467. Additionally, most of the transmission network needs extensive rehabilitation and replacement of network lines and transformers that have suffered from vandalism.

468. The objective under the NDS1 is to improve access to modern energy through expanding and reinforcing the transmission grid to ensure system stability and security of supplies. Access to electricity for both rural and urban areas is envisaged to increase from 44% in 2020 to 54% by 2025.
**Strategies to improve Access to Modern Energy**

469. The following strategies will be implemented during the NDS1 Period in order to ensure improved access to modern energy:

- Implementation of a programme for demand side management to ensure more efficient use of power supplies among consumers;
- Implementation of a comprehensive programme of financial restructuring for the transmission and distribution utility (ZETDC) to ensure that it has the capacity to enter into power purchase agreements with private suppliers of electricity;
- Investment in network upgrading and regional transmission to improve the country’s electricity wheeling capacity;
- Expand the transmission and distribution network as informed by analytical studies;
- Strengthen reactive power compensation equipment;
- Strengthening of energy sector planning process;
- Build capacity for local manufacture of Renewable Energy products;
- Regularly review the pricing policies to ensure cost recovery; and
- Creation of an Independent System and Market Operator (ISMO) to assist in Generation Resource Planning and buying of power from generators.

**Programmes and Projects**

470. Key programmes and projects targeted for implementation during the Strategy Period in order improve and ensure access to modern energy include the following:

- Renewable Energy Policy;
- Clean Energy Access;
- Rural Electrification Programme underpinned by Expanded Rural Electrification and Electricity End-Use Infrastructure Development;
- E-mobility Promotion;
- Fuel Supply and Strategic Reserve Management;
Replacement ad upgrading of transformer capacity; and
Institutional Capacity Building.

471. The above-targeted programmes will be realised through implementation of the following critical projects among others:-

Transmission and distribution projects such as ZIZABONA, Alaska Karoi;
Hwange 7 & 8 Power Expansion Project transmission Network;
Batoka Hyro Power Transmission Network; and
Procurement of transformers.

Energy Efficiency

472. Sustainable development requires that energy is extracted efficiently without compromising social, economic and environmental issues. The other dimension is of producing using less energy with minimum environmental damage and costs.

473. The country’s energy needs have increased considerably due to population growth, technological changes as well as changes in living standards.

Outcomes of Energy efficiency

474. During the NDS1 Period the objective is to achieve energy efficiency levels that ensures use of minimum level of energy to obtain the maximum economic output whilst minimising harm to people and the environment.

475. In order to achieve the targeted outcomes of improved energy efficiency, the following strategies will be prioritised during the NDS1 Period:-

Complete and implement energy efficiency policy and regulations;
Promote energy efficiency and conservation efforts;
Promote new and renewable energy sources;
Promote research and development in the use of new technologies;
Promote use of high technology equipment and plants in industry;
Undertake performance monitoring on energy efficiency; and
Fleet Age Policy.

476. The key programmes targeted for implementation during the Strategy Period aimed at improving efficiency in energy use are as follows:-

- Energy Conservation and Renewable Energy;
- Infrastructure Maintenance and Rehabilitation;
- Decommissioning of Old Inefficient Plant and Equipment;
- Demand Side Management; and
- Energy Efficiency Capacity Building.

Water, Sanitation and Hygiene

Situational Analysis

477. Access to clean, safe water and adequate sanitation facilities, is a basic human right. Water, sanitation and hygiene has multiple forward and backward economic linkages to key sectors including agriculture, energy and the mining sector. The availability of water and sanitation services, however, remains a huge challenge in the country.

478. Due to economic challenges among others, the water supply and sanitation systems and services in many urban and rural areas have deteriorated, adversely affecting water-dependent businesses and households. The water and sanitation situation remains weak with uneven outcomes. Only 29.7% of households in the country have access to improved water sources and sanitation.
479. The majority of the sewerage systems have experienced large-scale blockages, water treatment plants are dysfunctional and lack chemicals while many distribution systems that have fallen into disrepair.

480. Additionally, unreliable energy supply has affected efficient operation of the water supply and sewerage systems in urban areas. Erratic water supply has led to decreased industrial production and breakouts of water borne health crises.

481. Limited funding in the absence of effective Development Partner support and private sector investments have also affected financial capacity necessary to develop the water sector.

482. This is being compounded by the current non-cost reflective tariff structure, which is adversely affecting the ability of Local Authorities to undertake their mandate of building, operating, upgrading and maintaining water infrastructure including the conveyancing and reticulations systems.

**Water Supply**

483. The thrust of improved water supply during the Strategy Period hinges on ensuring that the proportion of the country’s population using a secure, potable drinking water source increases. The target is to increase access to potable water from 77.3% to at least 90% by 2025 and water storage capacity from the current $15.423 \times 10^6$ mega litres to $16.979 \times 10^6$ mega litres by 2025.

*Strategies to improve water supply*

484. During the Strategy Period, a number of strategies will be implemented to ensure improved water supply and storage facilities taking cognisance of the climate resilience issues as well as safety and security of water bodies.
485. The strategies will encompass the development of the National Dam Safety Plan and its implementation, strengthening existing capacities for water resources management and the further development of water resources to cater for existing and future demand as well as reducing hydrological and climatic vulnerability.

486. Rehabilitation and development of basic water storage and transport infrastructure facilities such as canals, pipelines and treatment plants will be prioritised during the NDS1 Period. This will include implementation of analytical studies, technical support, and capacity building for institutions with responsibilities of water resource management.

487. Drilling and hydrological investigations as well as expansion of hydrological stations will be prioritised in order to provide basic information for management of national water resources.

488. During the NDS1 Period, construction works on ongoing dam projects will be accelerated while the inspection programme for all major dams in the country to assess risks to public safety, extent of water losses, and extent of siltation will be strengthened.

489. To ensure sustainability of the water resource, demand management will be reinforced and ZINWA operations will be commercialised to ensure cost recovery when supplying raw and treated water for agricultural, household and industrial use.

Sanitation Services

490. The key objective under improved sanitation services is to expand access to improved sanitation facilities from 70.22% to 77.32% in both urban and rural areas, with particular attention to reducing open defecation in rural areas.
491. Additionally, priority will be on addressing weaknesses in capacities in the delivery of adequate sanitation services which include mobilisation of financial resources, human capital, technical skills, and equipment.

*Key Strategies to increase Access to Improved Sanitation Facilities*

492. During the Strategy Period, key strategies to achieve improved sanitation services include expansion of the on-going programmes that are targeting rehabilitation of the existing urban and rural network of sanitation facilities.

493. Implementation of institutional reforms that will strengthen coordination and implementation of sanitation programmes, and expansion of on-going hygiene education programmes for urban and rural communities will be prioritised. This will also include strengthening institutional capacities and coordination to enhance provision of sanitation in rural and urban areas.

494. Further, routine maintenance will be reinforced. This will be complemented by increasing capacity building on hygiene education programmes, public accountability and credibility of public entities responsible for provision of sanitation in both rural and urban areas.

*Transport Infrastructure and Services*

495. The economic challenges experienced over the past two decades have affected the ability of the country to ensure continuous and sustained rehabilitation and maintenance of transport infrastructure. Additionally, over-reliance on road transportation is putting pressure on already depreciated road networks, requiring extensive rehabilitation.
Situation Analysis

496. Over the past two decades, transport infrastructure has deteriorated as a result of long periods of inadequate maintenance, rehabilitation and upgrading.

Roads and Bridge Infrastructure

497. Given the strategic importance of the road network in enhancing accessibility as well as promoting domestic and regional trade as a key transport corridor, the priority is to ensure that the assets are rehabilitated and preserved. Of the total estimated 84,000 km of road network, equivalent to 93% of the network is in fair or poor condition and in need of rehabilitation or periodic maintenance.

498. In this regard, the NDS1 will target to increase the number of kilometres of road network converted to meet Southern Africa Transport and Communications Commission (SATCC) standards from 5% to 10% by 2025 and to increase the number of kilometres of road network in good condition from 14 702km to 24 500km by 2025.

Key Strategies to Improve Transport Infrastructure and Services

499. Over the NDS1 Period, Government will prioritise completion of ongoing road projects where significant progress has been achieved, but work remains uncompleted because of lack of funding.

500. Further, focus will be on rehabilitation of damaged sections of the trunk road system starting with uncompleted projects and the completion of the upgrading of unpaved trunk roads to surfaced standards.

501. It has been noted that a road can become an economy. In this regard, during the NDS1 Period, focus will be on development of feeder roads into communities as a way of developing underdeveloped remote areas.
502. Further, the following strategies will be implemented:

- Clearing the maintenance backlog in primary, secondary and feeder road networks;
- Upgrading of unpaved trunk roads to surfaced standards including uncompleted bridge construction along highly trafficked roads to prevent further loss;
- Develop a long-term national road infrastructure improvement plan to upscale private investments and Development Partner assistance in the sector;
- Expansion of network capacities in areas that are most important for access to markets and services by rural communities and rural business activities;
- Strengthening of financial and institutional capacities for regular maintenance of the network and for oversight of the road transport industry;
- Maximise the use of locally available resources including local contractors in the upgrading, rehabilitation, and maintenance as well as construction of roads infrastructure;
- Implementation of reforms in the roads sector to align Zimbabwe more closely with the requirements of the SADC Protocol on Transport, Communications and Meteorology;
- Economic evaluation of the road investment options to determine the optimal investment scenarios including low cost interventions on the highly trafficked roads that yield the most savings to the economy; and
- Review the current road user fees with the objective of ensuring cost recovery and re-investment in the road infrastructure.

Programmes

503. The following programmes will be implemented:

- Planned periodic and routine maintenance of existing roads infrastructure;
- Road rehabilitation; and
- Road construction in line with SATCC standards.
504. A number of key road projects, including the Harare-Beitbridge Road will be undertaken during the NDS1 Period.

**Road Transport Services**

505. Improved road transport services are critical in improving accessibility, facilitating both domestic, regional and international trade through facilitating the movement of goods and people.

506. The poor condition of a large part of our road network has had direct and indirect impacts on the road transport safety. The average number of accidents per year between 2010 and 2017 was 36,105 and the average number of people dying as a result of road accidents was 1,836. In 2016, the total number of accidents were 38,620 increasing to 42,430 in 2017. Similarly, the number of fatal accidents also increased from 2016 to 1,358 in 2017.

507. The objective during the NDS1 Period is to achieve high quality and efficient public transport services covering both the rural and urban areas. The target will be to reduce road accidents and fatalities by 25% margin per annum.

**Strategies to Improve Road Transport Services**

508. During the implementation of the NDS1, the following strategies will be prioritised to improve road transport services;
- Ensuring that road authorities install and maintain appropriate road signs on new and existing roads;
- Installation of visible road markings and signs that are less prone to vandalism;
- Implementing traffic management measures including traffic signs in line with regional standards, and ensuring that all possible engineering deficiencies on “black spots” are rectified;
- Establishment of standards for testing of persons for the issue of learners’ licenses and certificates of competency;
- Enforce safe driving practices or influence engineering design of roads to improve safety; and
- Implementation of reforms that address road safety including dissemination of information on road safety and undertake regular traffic surveys.

**Rail Transport**

509. A good railway network is key to the growth of domestic, regional, and international trade through connecting all major economic centers. It provides transport services for bulk raw materials, finished goods, and passengers. In addition, a good railway network also eases the burden on the road networks as well as reducing the costs of transportation of goods and services.

510. The country’s railway network is of strategic importance through its interconnectedness with other national networks along the North–South corridor. However, the network has experienced a number of challenges associated with aging track infrastructure, including insufficient ballast, rail wear, lack of spare parts, deteriorating earthworks, and obsolete rail signaling and communications equipment.

511. Out of the total rail network of 2,627 km, about 229 km or 9% is under caution. The deteriorated infrastructure has also led to prevalence of accidents and derailments.

512. Rolling stock also suffers from low availability and utilisation and, as a result, the railway is not able to meet current demand for freight services. Currently, out of a total fleet size of 166 locomotives, only 60 are operational.

513. Resultantly, freight carriage has fallen from a peak of 18 million tonnes in 2007 to current averages of 3 million tonnes per annum.
Outcomes of Rail Transport

514. The objective of rail transport under the NDS1 is to improve the rail infrastructure and increase freight as well as passenger movement. The target under the NDS1 is to increase the proportion of track meeting set standards (Track Quality Index) from 57% in 2020 to 68% by 2025, as well as increasing freight cargo moved from 2.6 million tonnes per annum in 2020 to 6.7 million tonnes per annum by 2025.

Strategies to improve Rail Infrastructure

515. To achieve outcome of improved rail infrastructure and services, Government will expedite the restructuring and unbundling of National Railways of Zimbabwe (NRZ) into State Owned Railway Infrastructure Company (Infrastructure Management) and a Privately Owned Railway Services Company (Operations).

516. Further, NDS1 will prioritise the following:-

- Recapitalisation of NRZ targeting refurbishment and replacement of NRZ rolling stock, signalling, ICT and track infrastructure;
- Developing long-term Rail Infrastructure Development Plan;
- Implementation of cost-based user fees, in line with regional benchmarks to improve operational and financial performance as well as to enable re-investment in infrastructure;
- Rebuilding customer confidence through Service Level Agreements (SLA) between NRZ and its regular customers;
- Up-scaling private investment and participation in infrastructure through long-term national rail Infrastructure Development Plan; and
- Capacity building including training of artisans to improve the availability of rolling stock.
Programmes and Projects

517. The above NDS1 strategies will entail implementation of the following:
- Procurement of rolling stock including locomotives, wagons and coaches;
- Rehabilitation and upgrading of track infrastructure;
- Rehabilitation and upgrading of signal and communication equipment;
- Rehabilitation and upgrading of electrical infrastructure;
- Rehabilitation and upgrading of plant and equipment;
- Upgrading of Information Communication Technology;
- Capacity building programme; and
- Technical studies.

Air Transport Infrastructure and Services

518. Air safety and security as well as airside and landside facilities are essential for the development and rebuilding of the country’s tourism industry. Increasing investments in aviation infrastructure can open up the country to more regional trade and increase the country’s competitiveness in the region.

519. Government over the past years has been making considerable efforts to improve the civil aviation infrastructure. However, more still needs to be done in terms of rehabilitation, upgrading, maintenance and expansion in critical areas.

520. The current air traffic control and safety equipment is old and in need of replacement. Closely related to traffic surveillance is the capability for aircraft communication to and from the ground as well as other airport handling equipment and facilities.

Outcomes of Air Transport Infrastructure and Services

521. Under the NDS1, the main objective is to have a reliable safe world-class air transport infrastructure and services. The target is to increase the annual cargo
handling capacity from 40.2 million tonnes to 43.0 million tonnes by 2025 and the number of passengers uplifted from 0.5 million to 2 million by 2025.

Strategies to Improve Air Transport Infrastructure and Services

522. To improve air transport infrastructure and services, Government will implement the following strategies:-

- Complete the substantial rehabilitation and upgrading of aviation infrastructure at the airports;
- Improve airspace management, safety and security as well as airport operations;
- Continue to liberalise the air transport market and finalise the way forward for Air Zimbabwe;
- Launch a privatisation programme to attract much needed private sector funding for rehabilitation and upgrade of airport facilities to accommodate the projected growth in passenger and freight movements;
- Pursue the route of PPPs to expedite completion of the key capital infrastructural projects especially relating to aviation safety;
- Operationalise the Bilateral Air Service Agreements (BASAs) to facilitate market access;
- Clear arrears to IATA in order to pave way for re-admission into alliances;
- Up-scale private investment and participation in infrastructure through long-term National Air Infrastructure Development Plan; and
- Promote local network and connectivity (Routes, frequency and reliability of services).

Marine Infrastructure and Services

523. Inspite of the size of the marine sub sector, it plays a pivotal role in economic development as it is key in promoting growth in the tourism industry through boat cruise and other leisure activities.
524. During the NDS1 Period, marine infrastructure and services will be prioritised to increase the passenger handling. The target will be to increase capacity and number of boats handled from 1,300 in 2020 to 1,400 by 2025.

**Strategies to improve Marine Infrastructure and Services**

525. The key strategies that will be prioritised under the NDS1 include the following:

- Upgrading, maintenance and rehabilitation of marine infrastructure;
- Developing long-term National Marine Infrastructure Development Plan;
- Implementing cost-based user fees in line with regional benchmarks; and
- Up-scaling private investment and participation in infrastructure.

**Programmes**

526. During the Strategic Period, the following programmes will be implemented:

- Inland Infrastructure Development; and
- Inland Water Safety Standards.
Digital Economy

527. Information Communication Technologies (ICTs), are key enablers of economic development, hence their entrenchment across all national development strategies for universal access to be attained by 2030 is indispensable.

528. Knowledge intense products and services rely on ICTs. During the NDS1 Period, in an effort to move the economy towards production of complex products and services, Government will promote the development of ICTs. This will improve Zimbabwe’s international ranking on Country and Product Complexity which as of 2018 was 109 out of 133 countries.

529. During the NDS1 Period, in order to enhance ICTs usage, measures will be put in place to develop smart programmes such as smart Government systems, smart agriculture, smart health and smart transport and safe cities through using ICTs.

530. Implementation of e-Government services has progressed steadily, through investments in the requisite ICT infrastructure, introduction of e-services to the citizenry in areas such as health, education, research and development, as well as the creation of Community Information Centres in some of the disadvantaged communities.

531. Over the past decade, great strides have been achieved in the uptake and use of Information Communication Technologies, as evidenced by the high active mobile penetration rates of 94.2% and the internet penetration rate, which stood at 59.1%, as at the first quarter of 2020. Further, the COVID-19 pandemic presented new opportunities for the sector, which can be fully exploited during the Strategy Period.

532. Notwithstanding the positive strides, the ICT sector is faced with challenges related to underutilisation of ICT infrastructure as reflected by slow pace in embracing ICTs in service delivery, particularly e-government.
533. In addition, the slow pace in the implementation of ICT infrastructure sharing has negatively affected performance of the sector leading to high access costs.

534. Further, the sector has been adversely affected by lack of access to capital, low investment in both hardware and software ICT components, shortage of critical ICT skills and low investment in Research and Development. Application of ICTs has also been weighed down by erratic power supply.

535. Whilst there has been significant improvement in the laying of ICT Backbone infrastructure, there is still a challenge in terms of last mile connectivity.

536. From the above-mentioned challenges, Zimbabwe in 2017 was ranked 136 out of 176 countries with an ICT Development Index (IDI) of 2.92.

**Access and Usage of ICTs**

537. The country intends to have internet access at village level by 2030, through the extension of the fibre optic backbone, and last mile connectivity. In this regard, Government, during NDS1 Period, targets to increase internet penetration rate from 59.1% in 2020 to 75.42% by 2025. Further, the mobile penetration rate is also expected to be increased to 100% by 2025.

**Key Strategies to Improve Access and Usage of ICTs**

538. In order to achieve improved service delivery through online digital platforms, Government will develop and impart appropriate ICT skills within the public sector whilst at the same time prioritising implementation of an effective change management program to ensure improved adaptation of ICTs.
539. Government will also expedite implementation of National ICT Device Factory, upgrade Government Internet Services Provider (GISP) infrastructure to improve utilisation of ICTs.

540. During implementation of the NDS1, priority will also be on development of E-Government Enterprise Architecture and Interoperability Framework, implementation of National Data Centre, improved coverage of the PFMS, as well as enhancement and optimisation of Government common connectivity infrastructure in order to realise improved efficiency and effectiveness in Government internal operations and administration.

541. Development of e-Government Cyber Security System will be adopted in order to reduce cyber related crimes.

542. In addition, the NDS1 targets full utilisation of the Whole of Government Performance Management System (WoGPMS) and MDA specific Management Information Systems will be implemented.

543. Key projects that will be implemented to achieve improved efficiency and effectiveness of services delivery by Government through online digital platforms include the following:-
   - Creation of data collection standard and its provision;
   - Systems interoperability standards for ICT gateways; and
   - Unified portal and universal access channels.

**Strategies to Increase ICT Usage**

544. In order to increase ICT usage, Government will strengthen the establishment of ICT access centres across the country with particular emphasis on marginalised areas. This will be reinforced through expansion of communication infrastructure, mainstreaming of ICTs to all sectors and provision of affordable access to ICTs.
545. The outcome of improved ICT usage will be achieved through implementation of the following programmes and projects:

- ICT Applications Services;
- ICT Infrastructure Development and Maintenance;
- ICT Capacity Building and Training;
- ICT innovation hubs;
- ID verification linked to the Registrar General’s Office;
- Digital Deeds Database;
- Digital database development; and
- Automation of water supply system (Telemetry).

**Improving Access to ICTs**

546. The overarching goal is to have affordable, accessible, ubiquitous and reliable ICT infrastructure that is fundamental to achieving an inclusive digital economy.

547. To improve access to ICTs, Government will ensure the deployment of broadband infrastructure as well as implementation of the Last Mile Connectivity.

548. In addition, access to ICTs will be enhanced through digitalisation of radio and television transmission complemented by infrastructure sharing among telecommunication companies.

**Programmes to Improve Access to ICTs**

549. To achieve improved access to ICTs, the following programmes will be implemented during NDS1 Period:-

- ICT Infrastructure Development and Maintenance;
- ICT Application Services.
**Increasing Investments in ICTs**

550. Investment in ICTs targeted at improving availability of ICT services among citizens will be prioritised during the Strategy Period. This will be achieved through promotion of private investment in ICTs, provision of incentives and implementation of investor friendly policies in the ICT sector.

551. Further, supporting ICTs innovation, technology transfers and adoption will complement investment in ICTs.

**Programmes to Increase Investments in ICTs**

552. Increased investments in ICTs will be achieved through implementation of the following programmes and projects:-

- Ease of doing business reforms in ICTs;
- Special Economic Zones for ICTs; and
- ICT Applications Services.

**Improving Compliance with ICT Regulations and Policies**

553. Compliance with ICT policies and regulations is targeted to increase from 75% to 85% whilst the number of policies and regulations enacted is targeted to increase from 0 to 5 during the NDS1 Period.

554. To achieve improved compliance with ICT regulations and policies, Government will prioritise enforcement of ICT sector policies and regulations as well as improvement in ICT governance.

**Programmes**

555. Improved compliance with ICT regulations and policies will be achieved through implementation of the following programmes:-

- ICTs sector policies and regulations;
ICT Governance;
ICT Applications Development and Management;
ICT Infrastructure Development and Management; and
ICT Monitoring and Evaluation.

*Increasing Consumer Satisfaction and Protection in the Use of ICTs*

556. Protection of consumer rights in the digital domain and fostering of a trustworthy online environment will be prioritised during the Strategy Period.

557. Further, to ensure increased consumer satisfaction and protection in the use of ICTs, Government will strengthen implementation of the Cyber Security Strategy.

*Programmes*

558. Promulgation of the Cyber Security Act will be prioritised during the NDS1 Period in order to ensure Increased Consumer Satisfaction and protection on use of ICTs.

*Increasing ICT literacy*

559. As the country strives to improve ICT literacy, priority will be to mainstream ICTs into the national curriculum as well as rolling out of ICT capacity development programmes, during the Strategy Period.

*Programmes*

560. Increased ICT literacy will be achieved through the following programmes:

- ICTs critical Skills Audit;
- Implementation of ICT Literacy Research and Development Programme;
- ICT Capacity Development; and
- ICT Application Services.
CHAPTER 7

HOUSING DELIVERY

Introduction

561. Adequate housing that is secure, peaceful and has dignity is a fundamental right for every citizen. The Constitution of Zimbabwe, in Section 28, identifies shelter as one of the national objectives. As such, "the State and all institutions and agencies of Government at every level must take reasonable legislative and other measures, within the limits of the resources available to them, to enable every person to have access to adequate shelter".

Situational Analysis

562. The TSP identified Housing Delivery as one of the Programmes targeted for implementation under Priority Public Infrastructure. The focus was on prioritising provision of housing stands and the requisite social amenities to address the housing backlog. Furthermore, all outstanding institutional accommodation projects that had stalled due to the economic challenges of the past decade were targeted for completion.

563. Despite the aforementioned aspirations, the country continues to experience a huge housing backlog, particularly in urban areas.

564. In the absence of planned interventions to cater for the growing urban population, informal settlements have in some cases developed on untitled land in and around most urban areas. These settlements lack basic services and social amenities. The problem is further compounded by inadequacies of existing infrastructure to cater for the demands of the growing population.
565. The delivery of affordable, sustainable, modern, functional housing and social amenities in urban and rural areas, thus, dovetails with Vision 2030 as espoused by His Excellency, the President, in 2018.

566. The delivery of affordable and quality settlements in urban and rural areas remains a huge challenge. Whereas the TSP pegged the housing backlog at 1.25 million units, the sector managed to record the following achievements: -
   - Development of 164 195 fully serviced residential stands across the country;
   - Development of 49 870 completed houses; and
   - Rehabilitation and construction of social amenities infrastructure.

567. Delivery of affordable and quality settlements has been hindered by a number of challenges, notably: -
   - Macro-economic instability;
   - Rapid urbanisation resulting in growth of informal settlements that lack title to land and access to basic services infrastructure;
   - Limited investment in on and off-site infrastructure for the provision of basic services such as roads, water and sanitation services;
   - Limited investment in social amenities that include schools, health and recreational facilities. This is more pronounced in new settlements and rural areas;
   - Limited access to housing finance by land developers, institutional investors and households;
   - Unaffordable serviced stands and housing units arising from overpriced services and products for property development and construction. As a consequence, some low income earners are opting for informal settlements to resolve their housing needs;
   - Scarcity of land for housing development as well as a cumbersome land delivery process to convert virgin land to individualised freehold title. A growing demand
for land and competing interest over land has negatively affected availability of land for social amenities such as schools and public health facilities;

- Environmental degradation;
- Lack of an up-to-date housing database for planning purposes including on demographics, housing, land and urban growth patterns;
- Poor urban and environmental planning practices, post-independence planning prioritising the development of rural areas above urban areas resulting in informal urban settlements;
- Outdated urban and building regulatory frameworks and outdated building standards resulting in overcrowded, inadequate and substandard houses;
- Weakening governance frameworks including local public institutions as well as citizen-led structures, failing to plan and manage settlements.

**Delivery of Affordable and Quality Settlements in Urban and Rural Areas**

568. Given the huge housing backlog and the inadequacies of attendant infrastructure, Government will, through the NDS1, prioritise citizens’ access to affordable and quality settlements in urban and rural areas. In this regard, during NDS1, Government will take a holistic approach in planning for housing settlements, which will include planning for provision of key basic infrastructure such as ICTs for the development of smart settlements for both urban and rural areas.

*Outcomes of Delivery of Affordable and Quality Settlements in Urban and Rural Areas*

569. Delivery of affordable and quality settlements in urban and rural areas is not the sole responsibility of a single agency in Government. It is a shared responsibility with various contributing development partners in the public, private and non-governmental sector as well as local communities, and international Development Partners.
570. Through collaboration with relevant partners, the NDS1 envisages the following: -

- Increased shelter for households;
- Improved land delivery for urban and rural housing;
- Improved access to basic services infrastructure in rural and urban areas;
- Improved access to social amenities. These include schools, recreational and healthcare facilities, vendor marts and workspaces for Micro, Small and Medium Enterprises (MSMEs);
- Increased access to housing finance; and
- Increased regularisation of informal settlements.

**Shelter for Households**

571. Access to safe and secure shelter remains a major challenge for a number of households.

572. Government is, therefore, targeting a cumulative 220 000 housing units to be delivered as a function of effective demand during the Strategy Period.

*Strategies to Increase Shelter for Households*

573. The delivery of shelter is dependent on the implementation of a number of key strategies that secure availability of funding from private and public sectors. To this end, Government, through an inter-sectoral committee, will encourage PPPs, as well as restructure and promote mortgage financing schemes.

574. Rental accommodation, which caters for young professionals, has not been growing in Zimbabwe. During the NDS1 Period, measures to increase rental accommodation such as flats will be prioritised. In this regard, the Rental Policy will be reviewed in order attract Pension Funds to invest in rental accommodation.
575. Further, Government will resuscitate the Housing Guarantee Fund (HGF), recapitalise the Rural Housing Fund and Civil Service Fund as well as pursue re-engagement with external partners involved in housing delivery.

576. Other elements key to the successful resolution of accommodation deficiencies require a reduction in the cost of constructing housing units. This will be achieved through enhanced research and development programmes to support adoption of appropriate technology, modern housing structures adapted for climate change and resilience as well as utilisation of locally available materials. In addition, utilisation of labour from beneficiaries will also go a long way in reducing the overall cost of construction.

577. A number of statutes governing housing construction are archaic and outdated. The reform of key pieces of legislation such as the Housing Standards Control Act and accompanying model building by-laws will be essential in order to minimise housing construction costs. Within the same context and guided by the Ease of Doing Business reforms, the plan approval process and routine inspection in collaboration with Environmental Health Practitioners will be strengthened and expedited to ensure habitable housing units.

578. In order to secure accommodation for public sector employees, provision of institutional accommodation, Government pool houses, and social housing units will be prioritised through funding from the PSIP. These houses will not be sold to sitting tenants or constitute a retirement package.

579. The preference for owner occupied housing continues to hinder delivery of housing units. Rental accommodation, which caters for young professionals, has not been growing in Zimbabwe. During the NDS1 Period, measures to increase rental accommodation such as development of flats will be prioritised. In this regard, during the NDS1 Period,
promotion of rented accommodation will be pursued through reviewing the Rent Regulations and curtailing the power of the Rent Board to determine rental levels.

580. In addition, the scope for prescribed asset status will be extended to include housing delivery. This will be complemented by vigorous enforcement to ensure compliance with prescribed ratios.

581. Measures to curtail the spread of COVID-19 have exacerbated the problem of unoccupied office space in the central business district. This presents an opportunity to convert such unoccupied units into residential accommodation as part of the densification programme. To further support the densification projects, housing developments will allocate 40% of land towards construction of flats.

Programmes and Projects

582. Increased shelter to households will be achieved through implementation of the following programmes: -
- Government Housing Revitalisation; and
- Review and alignment of legislation.

Improving Land Delivery for Urban and Rural Housing

583. Well planned and environmentally sustainable urban and rural housing settlements are dependent on appropriate and well managed land delivery systems. An increasing urban population must be matched by improved availability of land suitable for housing.

584. To ensure a successful housing delivery programme during the NDS1 Period, Government will, within the urban setup acquire 10 000 hectares for housing development. This will enable relevant agencies involved in land development to deliver on residential and ancillary stands with approved lay-out plans conforming
to local authorities’ by-laws. Affirmation of conformity to by-laws including environmental considerations will result in the number of stands with dispensation certificates increasing.

585. In rural areas, the provision of land will also pursue the villagised and planned settlements concept in order to preserve land for productive purposes and also protect fragile ecosystems. An initial 124 villagised and planned settlements will be delivered during NDS1.

Strategies to Improve Land Delivery for Urban and Rural Housing

586. A number of strategies will be pursued to achieve the desired outcomes. The housing land acquisition procedure will be reviewed with a view to expedite delivery of land for housing.

587. In order to curtail urban sprawl to adjacent rural land, provisions of the Rural District Councils Act, Traditional Leaders Act, Communal Lands Act, and Land Acquisition Act will be harmonised and enforced. Further, development structures will be revitalised to undertake community engagement.

588. The process to transfer title for land acquired for housing will be expedited. In addition, construction works will only commence upon approval of settlement and housing plans. The Department of Physical Planning and Local Authorities will be capacitated so as to reduce bottlenecks in the approval process. The approval processes will be streamlined and decentralised.

Programmes and Projects for improved Land Delivery

589. Land delivery for housing will be anchored on the following programmes during the Strategy Period:
- Land acquisition; and
• Capacity building; (for personnel in the relevant institutions responsible for land delivery).

**Access to Basic Services Infrastructure**

590. Basic services that facilitate household access to potable water, sanitation facilities, energy, trafficable roads and Information Communication Technology (ICT) are a minimum requirement for every settlement. However, these services are not accessible due to the absence of the necessary infrastructure. In some instances, available infrastructure can no longer cope with the increased population due to capacity issues or lack of maintenance.

591. The NDS1, envisages improved access to basic services. The proportion of households with access to safe drinking water is expected to increase from 77.3% in 2020 to 90% in 2025.

**Strategies to Improve Access to Basic Services Infrastructure**

592. Improved access to basic services is a collaborative effort that is dependent on the full implementation of strategies by a number of MDAs, as well as the private sector, non-governmental organisations and Development Partners. The strategies recognise the unique challenges prevalent in areas that already have access to some basic services and those that do not have the basic infrastructure to facilitate access to services.

593. Where basic services exist, community engagement and advocacy through community development structures will be prioritised to identify challenges and promote appropriate use and ownership of infrastructure and also intervene where necessary. These structures will, thus, be central to the maintenance of basic services infrastructure, such as boreholes, in rural areas.
594. Such initiatives will be complemented by strengthened monitoring, evaluation, operation, maintenance and rehabilitation of infrastructure. The dearth of expertise to deal with such interventions will be addressed through capacity building.

595. Maintenance and rehabilitation requires funding, hence the user-pay principle will be employed were appropriate, mindful of citizens’ rights.

596. In rural communities endowed with natural resources, extractive companies will be engaged to support provision of basic services as part of the Corporate Social Responsibility (CSR).

597. Construction of new on and off-site infrastructure using appropriate technology will be prioritised to support the provision of basic services where they are non-existent. Most households settled on self-help schemes do not have the capacity to fund the construction of such infrastructure, hence Central Government will intervene. Allocation of land will also be restricted to serviced stands, thereby minimising the burden for prospective homeowners.

598. Availability of funding will, however, determine commencement and finalisation of such works. PPPs, re-engagement of international Development Partners to fund off-site and onsite infrastructure, capitalisation of the General Development Fund, and increased direct funding from Treasury will address funding challenges for MDAs with the mandate to ensure provision of basic services.

599. As new settlements develop, focus will also be on densification and development of integrated communities in order to minimise the cost of providing basic services infrastructure. Prototype homestead models will be developed to guide new housing development, and this will pursue a demand led strategy.

600. To minimise environmental pollution and overcome costs related to power transmission infrastructure, use of off-grid renewable energy solutions will be prioritised. Such solutions will also support clean energy initiatives.
601. Development of ICT related infrastructure is critical for an e-enabled economy. In this regard, layout plans for all new housing programmes, developments and projects will be required to provide the necessary infrastructure to support provision of ICT services.

602. Utilisation of locally-available resources will also be pursued together with harnessing of indigenous knowledge systems.

Programmes

603. Improved access to basic services will rely on programmes to support construction, rehabilitation and maintenance of infrastructure by various institutions that shall superintend over revitalisation of roads, water, waste management, ICTs, transport and energy supply under Transport Infrastructure & Utilities.

Improving Access to Social Amenities

604. Household access to social amenities such as satellite early childhood development centres, schools, health care facilities, country clubs, vendor marts, and workspaces for MSMEs is a pre-requisite for an improved standard of living. Access to such facilities is dire in rural areas, resettlements schemes and informal settlements in and around urban settlements.

605. During the NDS1 Period, access to social amenities is targeted to increase from 62% in 2020 to 71% by 2025.

Strategies to Improve Access to Social Amenities

606. To achieve the outcome, strategies employed will rely on community engagement and community based management as well as ownership schemes. Additional strategies will focus on targeted rehabilitation of existing amenities and construction
of new facilities where these are non-existent in collaboration with the relevant partner institutions.

607. Rehabilitation and construction works will require capacitation of local authorities that superintend over these facilities. Optimal utilisation of resources through strengthening the Communal Areas Management Programme for Indigenous Resources (CAMPFIRE) project will generate funds for the rehabilitation and construction works. Further, Devolution and Decentralisation funds will be earmarked to support Local Authorities to provide these amenities.

608. Availability of land for social amenities in some communities is a challenge, hence land will be made available for such purposes. Further, through an Integrated Community Development Policy, and strengthened enforcement of existing by-laws, land will be reserved or made available for social amenities.

**Projects**

609. In order to support improved access to social amenities, Government will continue with the following projects:

- Construction and rehabilitation of schools; and
- Construction and rehabilitation Health facilities.

**Access to Housing Finance**

610. Increased access to finance will be a key success factor in housing delivery during the Strategy Period. The NDS1 envisages an increase in the amount of financial resources available for housing.

*Strategies to increase Access to Housing Finance*
611. The outcome will be achieved through implementation of the following additional strategies that will complement financing strategies to support increased shelter to households: -

- Employer assisted schemes;
- Promotion of Savings and Credit Cooperatives;
- Advocate removal of the cap on interest rates; and
- Direct contribution by cooperatives into the Cooperative Development Fund.

612. In addition, a stable macroeconomic environment envisaged during the Strategy Period that minimises the risk of default will assist housing delivery programmes.

**Regularisation of Informal Settlements**

613. Most informal settlements do not possess appropriate title to land. In addition, these settlements lack access to basic services and social amenities. Regularisation of informal settlements will increase household access to such services thereby minimising the need for demolitions and relocations.

614. During the NDS1 Period, settlements will be regularised and supported through provision of appropriate services.

**Strategies to Regularise Informal Settlements**

615. In addition to strategies identified to support provision of basic services and amenities, regularisation will be supported by the development and implementation of an appropriate legal framework. Spatial planning and provision of land for decanting are also essential elements of the regularisation programme.

616. Provision of financial resources and capacity at the local level to implement development projects decentralised to the rural areas, will also reduce migration to urban areas.
617. Going forward, the development of informal settlements will be curtailed through increased monitoring adherence to approved master plans.

*Programme*

618. The regularisation initiative will be supported by the Informal Settlements Regularisation Programme.
CHAPTER 8
HUMAN CAPITAL DEVELOPMENT AND INNOVATION

Introduction

619. Human Capital Development and Innovation are the engine which will drive the NDS1 and the country’s progress towards Vision 2030. Human Capital Development and Innovation will create the right conditions for a knowledge driven economy for sustained growth, industrialisation and modernisation of the country.

Innovation and Knowledge Driven Economy

Situational Analysis

620. Zimbabwe’s basic education achievements to date include above 90% for gross intake rates (GIR) and a steady progress on Net Intake Rate (NIR), Net Enrolment Rate (NER), completion rates, and Gross Enrolment Rate especially for the Early Childhood Development (ECD) classes.

621. Despite the policy of automatic promotion that is in force at the basic education level, whereby learners proceed to the next level regardless of their results, about 17.8% of Grade 7 learners have been failing to enrol for Form 1 mainly due to inability to pay fees.

622. Over the past decade, the quality of education and basic foundational skills such as literacy and numeracy have declined, which is generally of concern across the country, and particularly for disadvantaged learners in rural and remote areas. Also, children with disabilities exhibit lower school attendance and are not completing a full cycle of education.
623. Although an inclusive approach has been adopted, with resource units set up in primary schools, this has not been the case for secondary schools, where such facilities are significantly under-resourced and teachers require additional support and training to make them fully viable.

624. Dropouts at the primary level are relatively low as compared to secondary level. The major causes for secondary level dropouts include child marriages, adolescent pregnancy and the burden of high fees, with about 30% of girls dropping out in Forms 3 and 4.

625. Infrastructure remains a critical challenge to the country’s Education Sector as the demand for education continues to increase and school facilities require renovation and upgrading. Between 2013 and 2019, the pupil to classroom ratio for ECD increased from 38.4:1 to 60:1, while the ratio for primary increased from 42.6:1 to 46:1.

626. The shortage of infrastructure has led to the introduction of hot-sitting or double shifts in 7.6% of primary schools and 4.1% of secondary schools; an arrangement that affects quality due to limited time for instruction and learning.

627. Disasters such as cyclones have had a huge toll on education infrastructure with schools having roofs blown off, wash facilities destroyed and weather induced droughts leaving many children vulnerable. In addition, COVID-19 pandemic has resulted in loss of learning time that will be difficult to make up for.

628. Lack of disaster risk reduction and resilience mechanisms have increased the sector fragility.

629. Heavy reliance on parental contributions for fees and levies to support teaching and learning at school level continues to widen the gap between rich, urban schools and poorly resourced rural schools.
630. At 8.5% Gross Enrolment Rate, the country’s tertiary enrolment rate is yet to match the level of some regional counterparts. Tertiary Gross Enrolment Rate continued to increase between 2010 and 2015 (from 6% to 8.5%) despite deteriorating public investment in education, underscoring the strong demand for tertiary education in Zimbabwe.

631. The Zimbabwe National Qualifications Framework has introduced a clear distinction between higher education and tertiary education, which is not common in other countries. The absence of this articulation inhibits the movement of students between the two subsystems.

632. Zimbabwe’s Higher and Tertiary education lacks a comprehensive information-management system. This constrains performance monitoring and weakens the foundation for evidence-based policymaking.

633. The Zimbabwe Council for Higher Education (ZIMCHE)’s funding model relies on a levy imposed on each university based on enrolment, creating a strong disincentive for universities to report accurate enrolment figures accurately thereby prejudicing ZIMCHE.

Outcomes of Innovation and Knowledge Driven Economy

634. The national outcomes of the innovation and knowledge driven economy are:-
- Specialised Workforce;
- Increased Innovation for Industrialisation; and
- Improved access and utilisation of advanced knowledge and technologies.

Specialised Workforce

635. The objective during the Strategy Period is to increase Critical Skilled Experts Available from 38% in 2020 to 51% by 2025.
636. To achieve the objective, Government will fully re-configure the Higher and Tertiary Education System from the tripartite education system of Teaching, Research and Community-service (Education 3.0) which produces only literate job seeking graduates, to that which includes Innovation and Industrialisation, which produces entrepreneurs, quality goods and services (Education 5.0).

637. Central to Education 5.0 will be an active review of degrees offered by state universities with a view to standardising qualifications and abolishing ‘irrelevant’ programmes that are ostensibly creating ‘idle’ graduates who do not have innovative skills.

638. All higher and tertiary education programmes shall be made Education 5.0 compliant during the Strategy Period.

639. With the strong desire for a specialised workforce, new educational programmes supported by modern infrastructure will be developed. During the Strategy Period, Government will introduce a transformative, innovative and responsive curriculum tailored to meet industry needs.

640. During the NDS1, promotion of critical specialist skills will also be prioritised through policy and legislation.

641. While remittances are almost universally affirmed as an important gain to recipient countries, harnessing knowledge and skills from specialised skills in the diaspora is equally important in the recipient countries. Against this background, strategic interventions to harness knowledge and skills from the specialised workforce in the diaspora will be prioritised during the Strategy Period.
642. In an effort to ensure the development of a specialised workforce, Government will establish Post Qualification Industrial Training Institutions, a National Civil Service Strategic Academy for training of Critical Skills in the civil service and develop heritage-based research and innovation framework.

643. Further, deliberate efforts shall be made to increase the use of indigenous languages as prescribed in the Constitution of Zimbabwe and skills retention measures shall also be instituted during the Strategy Period.

**Innovation for Industrialisation**

644. During the NDS1 period, Government’s vision on Education 5.0 will be to equip graduates with skills that empower them to become innovative towards societal development through transformative science and technology knowledge application that delivers goods and services. Innovation will bridge the gap between knowledge produced in lecture rooms, laboratory and industry production.

645. The objective is to ensure that resources earmarked for Research, Development and Innovation will be availed in order to operationalize Innovation Hubs and Industrial Parks in Institutions of Higher learning.

**Strategies to Increase Innovation for Industrialisation**

646. The following strategies will be implemented to ensure increased innovation for industrialisation during the NDS1 Period:-

- Enhance capacity building in critical skills shortage areas across all sectors;
- Establish robust scalable research infrastructure;
- Capacitate National Strategic Institutions such as Centres for Education Research, Innovation and Development (CERIDs), National Manpower Advisory Council (NAMACO), Zimbabwe National Geospatial and Space
Agency (ZINGSA), Zimbabwe Centre for High Performance Computing (ZCHPC) and Heritage Technology Institute;

- Operationalise the Venture Capital Fund, heritage based higher and tertiary education, science and technology development; and
- Set up and operationalise Innovation Hubs and Industrial Parks in institutions of Higher learning.

**Strategies to realise Access and Utilisation of Advanced Knowledge and Technologies**

647. During the NDS1 Period, Government will implement the following strategies to realise improved Access and Utilisation of Advanced Knowledge and Technologies:-

- Standardise and harmonise basic education, tertiary and higher education through the Zimbabwe National Qualifications Framework and complementary programme infrastructure frameworks;
- Invest in new and existing institutions of technology;
- Expand concessionary bandwidth for education institutions;
- Establish robust governance structures for the modernisation of education institutions;
- Develop internationally competitive education institutions infrastructure;
- Scale up development of advanced technologies in institutions of higher learning; and
- Reconfigure and Internationalise Higher and Tertiary Education to attract more foreign students.

**Programmes for Innovation and Knowledge Driven Economy**

648. During the NDS1 Period, Human Capital Development and Innovation will be anchored by the following areas:-

- Education and Training; and
- Innovation Science and Technology Development.
**Education and Training Sector**

649. During the NDS1 period, Education and Training will be instrumental in creating societies that are able to develop tangible goods and services. The following are Education and Training Sector outcomes that will be realised during the Strategy period:

- Improved access to quality, equitable and inclusive Education;
- Increased uptake and application of STEM/STEAM Subjects; and
- Improved relevant demand driven skills for industry, commerce and public sector.

**Access to Quality, Equitable and Inclusive Education**

650. While the country has made significant strides in achieving universal primary education, a key challenge remains in the access to quality, equitable and inclusive education across education levels as measured by the Net Enrolment Rates (NER). During NDS1, additional attention will be directed to broadening access and participation to quality, equitable and inclusive education by disenfranchised populations that are found in remote places and over-crowded urban areas.

**Strategies to Improve Access to Quality, Equitable and Inclusive Education**

651. During the NDS1 Period, the following strategies will be implemented to realise improved access to quality, equitable and inclusive Education:

- Capacity building initiatives in inclusive education for schools, colleges, training institutes and universities;
- Diversify revenue sources for Higher and Tertiary Education Institutes (HTEIs), Public Service Academy and Schools;
- Internationalise the country’s education and training;
Strengthen Higher Education Examinations Council (HEXCO) and Zimbabwe Examinations Council (ZIMSEC)'s capacity for efficient management of public examinations;

Promote usage of indigenous languages in the education sector;

Adopt innovative technologies that support effective instruction and blended learning as well as alternative learning approaches from ECD upward;

Upscale and strengthen provision of loan facilities for underprivileged students;

Operationalise education policies to assist in equalising learning opportunities and improve the quality of learning (Early Learning Policy, the Inclusive Education Policy, School Financing Policy, Zimbabwe School Health Policy);

Establish Zimbabwe Education Development Fund (ZEDF);

Enhance digitalisation of primary and secondary schools, colleges, universities and training institutions;

Strengthen and expand PPPs for infrastructure development in the Education and training sector to complement public investment in both basic and tertiary education;

Improve the resilience of the sector by entrenching DRR in construction, maintenance and daily routines of education sector.

Review and strengthen audit delivery systems;

Implement the policy on at least one state provincial teachers’ college, polytechnic, industrial college and University; and

Strengthen water reticulation and electrification of schools.

652. The following programmes will be implemented during the NDS1 period in order to achieve improved access to quality, equitable and inclusive Education:-

National strategic institutions capacitation;

Study in Zimbabwe; and

Infrastructure Development and Rehabilitation in Schools, Colleges, Universities and Training Institutions.
Uptake and Application of STEM /STEAM Subjects

653. Despite Zimbabwe’s emphasis on STEM-focused education since 2012 as a response to the country’s needs for innovation, industrialization, and creation of wealth for all, very few students—especially girls and women—pursue STEM subjects at secondary and higher education levels. At basic education level, Zimbabwe will encourage the uptake of STEAM subjects as feed into STEM.

Strategies to Improve Uptake and Application of STEM /STEAM Subjects

654. During the NDS1 Period, Government, in collaboration with stakeholders, will undertake continuous revision of curricula at all levels of education to enhance the relevance of education system for labour market. This will include focus on important contemporary global market skills needs, such as science, technology, engineering, mathematics, entrepreneurship and strategic leadership training. The following strategies will be implemented to ensure increased uptake and application of STEM /STEAM Subjects:-

- Incentivise training in STEM disciplines;
- Promote the uptake of STEM/STEAM Subjects at all levels of learning;
- Construct, equip and re-tool laboratories, workshops and education facilities; and
- Increase number of STEM teachers.

655. The following programmes will be implemented during the NDS1 period in order to realise increased uptake and application of STEM/STEAM subject:-

- STEM/STEAM Teacher capacitation; and
- STEM/STEAM Institutions capacitation.
Specialist Skills for Industry, Commerce and Public Sector

656. A National Critical Skills Audit, conducted in 2018 to assess country’s skills deficits and surpluses, confirmed the existence of large gaps between the supply and demand for skills in several key sectors, with an overall deficit of 68% in the production of qualified specialists and technicians, especially in the Natural & Applied Sciences, Engineering & Technology, Medical & Health Sciences and Agriculture.

Strategies to Improve Availability of Specialist Skills for Industry, Commerce and Public Sector

657. During the NDS1 Period, improved availability of specialist skills for industry, commerce and public sector will be achieved through the following strategies:-

- Design appropriate Staff Development Programmes for capacity building;
- Ensure meritocratic promotions of qualified human capital in the public sector;
- Employ predictive modelling applications to improve education service delivery;
- Mainstream green skills, ethics and values in the education curriculum;
- Incentivise specialist education and training skills;
- Promote Universities Ordinance harmonisation;
- Implement the recommendations from National Critical Skills Audit of 2018;
- Strengthen the National Apprenticeship programme;
- Internationalise the Zimbabwean education and training sector;
- Re-align Curricula on Skills Training and Development to meet needs of industry, commerce and the public sector;
- Re-configure Technical Vocational Education and Training (TVET) to Education 5.0;
- Operationalise the Zimbabwe National Qualification Framework (ZNQF);
- Capacitate members of the Public Service to ensure quality service delivery;
- Implement a targeted mentorship and talent management programme;
Strengthen monitoring and evaluation frameworks for skills assessment by ZIMCHE, HEXCO and ZIMSEC;
Expand health, engineering technology and agriculture specialists and introduce critical para-professional training programmes locally;
Establish vital strategic PPPs in training of Health, engineering technology and agriculture professionals;
Re-tooling and re-equipping of laboratories, workshops and training facilities;
Facilitate international specialists training exchange programmes; and
Transform Higher Education Examination Council (HEXCO) to an independent entity of the MHTEISTD.

658. The following programmes will be implemented during the NDS1 Period in order to realise improved availability of specialist skills for industry, commerce and public sector:-
Specialist Skills Training and Development;
Culture Sports and Recreation skills development;
Staff Retention;
Public Sector Accountants, Auditors and Public Sector Procurement personnel capacity development;
National Apprenticeship; and
Graduate Industrial Internship.

Innovation, Science and Technology Development

659. The main objective under increased Innovation for Industrialisation outcome is to increase the number of commercialised International Property Rights Issued from 23 in 2020 to 60 by 2025.
660. To realise the thrust of improved research development and innovation throughput, Government will undertake the following strategies:-

- Equip Training and R&D Institutions with state-of-the-art infrastructure;
- Engage private, public and other stakeholders to develop state of the art research infrastructure through Public, Private, Partnerships (PPPs), Built Operate and Transfer (BOT), Built Own Operate and Transfer (BOOT) and Repair Own Operate and Transfers (ROOT) arrangements for the commercialisation of health, engineering technology and agricultural research;
- Strengthen Centres for Educational Research, Innovation and Development (CERIDs);
- Establish Biopharmaceutical plants in the country; and
- Establish a framework for competitive incentives, remuneration packages and conditions of service for researchers.

Programmes

The following programmes will be implemented:-

- Virtual and Augmented Reality Centre;
- Zimbabwe Centre for High Performance Computing (ZCHPC) expansion and restructuring;
- Emerging Technology diplomacy and transfer;
- Innovation science and technology driven rural industrialisation;
- Agricultural Research and Development programme for the value addition and beneficiating of agricultural goods and services; and
- National Science Technology and Innovation System.

Science and Technology Innovation Ecosystems

661. While Zimbabwe commands extraordinary creative human capital development resource, it has struggled to realise its full economic potential. The Government
Innovation Science and Technology Development priority programme will focus on the innovation type of industrialisation to act as a conduit for universities and colleges to innovate products based on Zimbabwe’s natural heritage, which promotes import substitution and domestication of value chains as pillars for industrial growth for the industrialisation and modernisation of Zimbabwe by 2030.

**Strategies to Improve Science and Technology Innovation Ecosystems**

662. During the NDS1 Period, Government will undertake the following strategies to enhance improved innovation ecosystems:-

- Capacitate national strategic technology institutions such as Zimbabwe National Geospatial and Space Agency (ZINGSA) and Zimbabwe Centre of High Performance Computing (ZCHPC);
- Establish and strengthen innovation hubs at all state universities;
- Operationalise Industrial Parks to commercialise prototypes;
- Establish diplomatic technology transfer initiatives;
- Establish a HeritageTechnology Institute;
- Implement the National Science and Technology Innovation System;
- Introduce Science Academies, Technical High Schools, Biotechnology, Robotics and Coding Clubs for improved foundational innovation ecosystems with a view to establishing linkages and trade-offs across sectoral value chains; and
- Develop and implement a policy on adoption and adaptation of emerging technologies: Big Data Analytics, Artificial Intelligence (AI) and Virtual Augmented Reality (VAR); and
- Capacitate HTEIs on Intellectual Property Rights.

**Programmes**

663. To realise the improved innovation ecosystem, Government will prioritise the implementation of the following programmes:-
- Energy and Minerals Research;
- Adoption of Life Technologies;
- National Strategic Institutions;
- Programme of Setting up of Business Units and Technical High Schools/Science Parks in schools;
- Virtual Collaboration Nodes (VCN) programme to support e-applications across sectors;
- Geospatial, Aeronautical and Space Science Capability;
- Block-Chain and Big Data Analytics Technologies; and
- Smart Zimbabwe Programme.
CHAPTER 9

HEALTH AND WELLBEING

Introduction

664. Good health is central to human happiness and well-being. It also makes an important contribution to economic progress, as healthy populations live longer, are more productive, and accumulate more savings.

Public Health and Well-being

Situational Analysis

665. The Zimbabwean Health System has some underlying strengths such as a skilled and knowledgeable health workforce and firm Primary Health and Hospital Care foundations. This has contributed to significant strides in reducing the Maternal Mortality Ratio (MMR) from 960 per 100,000 live births in 2010–11 to 462 /100,000 live births in 2019.

666. HIV prevalence has decreased by 28 percent, while tuberculosis (TB) incidence has dropped by nearly 60 percent over the last decade. The overall incidence of malaria has fallen drastically, from 136 per 1,000 population in 2000 to 19 per 1000 in 2018. Mortality declined by 58.4 percent from 462 deaths recorded in 2015 to 192 deaths reported in 2018.

667. These gains are under threat due to economic challenges, compounded by climate change and health related shocks like cholera and COVID-19, which are undermining the health system and contributed to rapid deterioration in health outcomes in general and specifically in maternal, new-born, child and adolescent...
health indicators. Neonatal mortality rate has increased from 29 to 32 deaths per 1,000 live births.

668. Although, overall health sector funding has been increasing from 2014-2019, driven mainly by increases in domestic funding, a number of key health programmes are still largely being funded by development partners. The resource mapping exercise has shown that since 2014, domestic funding has been contributing about 55% with the remaining 45% contributed by Development Assistance for Health (DAH) as indicated on Figure 16 below.

Figure 16: Zimbabwe Health Care Financing, 2014-2019

![Figure 16: Zimbabwe Health Care Financing, 2014-2019](source)

669. The Health sector is also faced with critical shortage of specialised professionals and health-care staff, demotivated staff who go on strikes, dilapidated hospital infrastructure, lack of essential medicines and commodities, inadequate emergency services for delivery and under-utilisation of existing antenatal services.
670. Despite notable progress in the coverage of Reproductive, Maternal, New-born, Child and Adolescent Health and Nutrition (RMNCAH&N) services, key impact indicators such as Maternal Mortality Ratio (MMR), Infant Mortality Rate (IMR), Neonatal Mortality Rate (NMR) and Under-5 Mortality Rate (U5MR) have not improved. Further, several outcomes improved but not to the extent expected with an increase in service coverage because of lack of commensurate improvements in quality of care.

671. Incidences of Non-Communicable Diseases (NCDs) such as hypertension, heart disease, diabetes and cancer have increased and funding is still skewed towards communicable diseases. The double burden of diseases characterised by high morbidity and mortality due to NCDs requires a paradigm shift and urgent reforms across the health system.

672. The situation is being exacerbated by low Health Insurance coverage in the country, the high cost of health services and weak multi-sectoral coordination of programmes and projects in the sector.

673. This has resulted in high out of pocket expenditures arising from payment at point of care. Private health insurance schemes in Zimbabwe are multiple and fragmented. As a result, it is not clear to what extent they are contributing to financial protection. With smaller, multiple pools, cross subsidisation is not realised.

674. Availability of medicines remains a challenge especially for some vital medicines due to inadequate funding and inefficiencies in procurement logistics and supply chain management. Government funded programmes are characterised by low medicine availability and these include NCDs and mental health. Medicines for specialist care and surgical commodities are also in short supply.
675. A healthy population is crucial for the realisation of economic growth and the achievement of an upper middle income society, hence implementation of Health Sector Reforms will be prioritised during the Strategy Period.

**Improving quality of life**

676. Health is a fundamental human right in terms of the Constitution of Zimbabwe, hence the overall outcome of the Health sector during the NDS1 Period is to improve quality of life, and improve life expectancy at birth from the current 61 years to 65 years.

**Improving domestic funding for health**

677. The focus of the NDS1 is to increase Public Health Expenditure Per Capita from USD$30.29 in 2020 to USD$86 by 2025.

*Strategies for improved domestic funding for health*

678. Government will implement the following strategies to achieve improved domestic funding for health during the NDS1 Period:-

- Develop and implement a Health Sector Coordination Framework;
- Harmonise the fragmented health funding pools; and
- Implement cross subsidization of Health Insurance Benefit schemes.

*Programmes*

679. To achieve improved domestic funding for health during the NDS1 Strategy Period, the following programmes will be implemented:

- National Health Insurance Schemes; and
- Domestic resource mobilisation;
Improving human resource performance in the health sector

Strategies

680. In order to achieve improved human resources performance during the Strategy Period, Government will implement the following strategies:
   - Implement single spine remuneration scheme for health care workers;
   - Provide adequate tools of trade;
   - Institute non-monetary incentive;
   - Implement strategic rebranding of the health sector;
   - Strengthen training of health professionals to international standards; and
   - Accelerate restructuring of Ministry of Health and Child Care (MoHCC) and the Health Service Board (HSB) to be fit for purpose.

Programmes

681. In order to achieve improved human resources performance during NDS1 Strategy Period, Government will implement the following programmes:
   - Health sector Human Capital development;
   - Pay and benefits development; and
   - Health sector restructuring.

Improving Access to Essential Medicines

Strategies

682. The following strategies will be implemented by Government to achieve improved access to essential medicines during the Strategy Period:
   - Supporting local drug manufacturing;
   - Strengthen procurement and regulation of medicines and commodities;
   - Capacitating NATPHARM;
Strengthen traditional complementary and alternative medicine;
Mitigating against leakages, pilferage and losses;
Reinforcing rational use of medicine; and
Review of policies that improve drug availability and adoption of innovative medicines stock control measures.

Programmes

683. The following programmes will be implemented to enhance medicine availability during the Strategy Period:-
- Biomedical Engineering, Biomedical Science and Bio Pharmaceutical Production;
- Public Health; and
- Curative Services.

Improving Access to Primary & Secondary Health Care and Enabling Environment for Health Services Delivery.

Strategies

684. In order to achieve improved access to primary and secondary health care during the NDS1 Strategy Period, Government will implement the following strategies:
- Review of National Health Policy;
- Strengthen functionality of parastatal and Hospital Management Boards,
- Re-align Ministry Functions;
- Finalise and implement Community Health Strategy;
- Finalise and implement the Health Management Information System (HMIS) policy/strategy;
- Rationalise patient load at every level of the health system, while offering an appropriate quality service package;
- Intensify capacity building on Tele-medicine platform programme;
- Capacitate Health Centre Committees;
- Enhance and ensure comprehensive referral system;
- Establish quinary level facilities; and
- Promote traditional, complementary and alternative medicine package programme.

**Reducing Morbidity and Mortality due to Communicable and Non-Communicable Diseases**

**Strategies**

685. In order to achieve reduced morbidity and mortality due to communicable and non-Communicable diseases, the following strategies will be implemented by Government:

- Strengthen implementation of Malaria Elimination Strategy;
- Strengthen implementation of the 90 90 90 HIV Strategy; and
- Strengthen implementation of End TB strategy.

**Programmes**

686. The following key programmes to achieve reduced morbidity and mortality due to Communicable and Non-Communicable Diseases will be implemented during the Strategy Period:

- Malaria elimination;
- HIV and AIDS;
- TB programme;
- Neural Tube Defects (NTD) control;
- Epidemic Prone Diseases control;
- Water and Sanitation;
- Reproductive, Maternal, New-born, Child and Adolescent Health and Nutrition;
Nutrient Supplementary; and
Prevention and Control of NCDs.

Healthy Lifestyles and Sport for Health Purposes

Strategies

687. Promotion of sport for health will be intensified during the NDS1 Period to achieve increased public health and well-being. The following strategies will be implemented:

- Establish community clubs that promote healthy lifestyles;
- Stakeholder engagement in the purchase and maintenance of equipment and consumables for wellness programmes; and
- Establish community nutritional programmes and community support groups.

Programmes

688. Community Youth, Sports, Art and Recreation Club System and Community Development are some of the key programmes that will spearhead sport for health purposes.

Access to Water, Sanitation and Healthy Environment

Strategies

689. In order to achieve increased access to water, sanitation and health environment, the following strategies will be implemented during the NDS1 Period:

- Implement the national campaign to eliminate Open Defecation and diarrheal diseases;
- Enforcement of existing regulations and empowering of communities to effectively manage waste;
- Enhance WASH advocacy and promotion as well as harmonise WASH sector statutes and policy instruments;
- Adapt and institutionalise Pooled Funding Mechanism for WASH; and
CHAPTER 10

IMAGE BUILDING, INTERNATIONAL ENGAGEMENT AND RE-ENGAGEMENT

Introduction

690. The Second Republic ushered in a strategic opportunity to improve the country’s image and international relations, allowing Zimbabwe to claim her rightful place among the community of nations. Improved relations with the international community will be leveraged in respect of the country’s quest to attract investment, promote economic growth and national wealth creation within the context of global economy.

691. Notably, countries increasingly depend on good image, diplomacy and international standing in the competition for inward investments, tourist arrivals, favourable international trade relations and increased exports to support job creation and better living standards for citizens as envisaged in Vision 2030.

Situational Analysis

692. Zimbabwe’s international goodwill was damaged following the implementation of the Land Reform Programme, and the backlash from the international community was immediate through imposition of illegal sanctions and unfavourable international media coverage.

693. The sustained bad publicity heightened the country risk factor and undermined investor confidence, while politically the Zimbabwean society became and has remained highly polarized.

694. The situation was exacerbated by lack of a clear commitment and actual redress of external debt arrears, a critical factor slowing the re-engagement process with the International Financial Institutions and bilateral partners.
695. A restrictive visa regime in comparison with other countries in the region has created a huge disincentive for tourists and investors who are opting to take their patronage and business elsewhere.

696. Consequently, Zimbabwe’s ranking on a number of internationally recognized indices that project the country’s image declined over the past two decades. For instance, the 2014 Good Country Index ranked Zimbabwe 120 out of 125.

697. However, ongoing reforms, including the Ease of Doing Business, have seen the country moving up the Good Country Index ranking to 102 out of 153 in 2019. In addition, Zimbabwe ranked 19 out of 48 African countries in the Country Brand ranking index in 2019.

698. To this end, a robust information management and dissemination process to project Zimbabwe as an attractive investment destination and building a highly competitive national brand is critical for re-engagement and image building.

699. The shift from traditional diplomacy to economic diplomacy has huge potential to improve the country's image, strengthening cooperation with the international community, thus improving economic recovery growth prospects.

**Image Building**

700. The main objective under Improved Country image is to:
- Improve on the Good Country Index from 100/153 in 2020 to 90/153 by 2025;
- Improve on the Country Brand Ranking from 120/189 in 2020 to 100/189 by 2025; and
- Improve on the Global Happiness Index from 146/191 in 2020 to 100/191 by 2025.
Informed Nation and International Community

Strategies

701. An informed and knowledgeable society is a pre-requisite for creating a shared national vision and collective sense of national identity. In order to inform the nation and international community and project a positive image for Zimbabwe, the following strategies will be implemented:

- Develop an effective and coherent information communication strategy to accurately inform the nation and the international community;
- Develop a robust national publicity strategy with a clear communication protocol to enable a two-way communication between Government and its publics;
- Re-shape the national viewpoint through content creation, development and dissemination to improve Zimbabwe’s visibility;
- Develop a powerful national adornment drive in which national symbols and cultural heritage are used;
- Align existing laws to the Constitution reinforced by the maintenance and administration of a good regulatory framework and facilitation;
- Enhance traditional media through a robust Digital Media Strategy;
- Modernise communication infrastructure, particularly the expansion and digitalization of media platforms;
- Efficient maintenance of the existing media infrastructure and capacitating the Government Internet Service Provider (GISP);
- Recommend sprucing up and adornment of public buildings and spaces in Zimbabwe and Missions abroad with Zimbabwean art, culture and heritage products; and
- Improve public relations especially at ports of entry through requisite frontline Officers’ training as well as dressing and adornment of reception areas.
Programmes

702. The NDS1 will implement the following programmes for informed nation and international community:

- Information management, publicity and national adornment; and
- Modernization and maintenance of media infrastructure.

Competitive Branding

Strategies

703. In order to improve national branding, the following strategies will be implemented:

- Create a highly competitive national brand, incorporating the provinces;
- Establish a national branding Committee to strengthen coordination and harmonisation;
- Develop a strong national brand through marketing heritage, world class education, health care and transport, low crime levels, peace and stability;
- Broaden the capacity building programme in protocol and diplomatic services for Officials in the Civil Service and Public Entities; and
- Develop a robust inclusive national events strategy.

Programmes

704. The NDS1 will implement a National Branding Programme to improve competitive branding.

International Engagement and Re-Engagement

705. In line with the aspirations of Vision 2030, Government, through NDS1 will accelerate engagement and re-engagement process aimed at reintegrating Zimbabwe into a favourable global position.
International Relations

Strategies

706. Government through NDS1 will implement the following strategies for improved international relations:

- Bolster and consolidate existing relations with countries with SADC countries, the African Union, BRICS and its traditional friends;
- Continue to engage and re-engage international community;
- Prioritise re-joining the Commonwealth as a launch pad to unlock international goodwill;
- Sustain and escalate the re-engagement milestone already realised through the resumption of political dialogue with the European Union (EU);
- Develop a post-Staff Monitored Programme (SMP) economic reform programme to enable re-integration onto the global financial markets;
- Accelerate implementation of the Global Compensation Deed and explore international opportunities to raise funding and ensure the settlement within the agreed framework;
- Fast-track the resolution and ratification of outstanding Bilateral Investment Promotion and Protection Agreements (BIPPAs);
- Launch bids to host internationally accredited global events and conferences;
- Organise trade, tourism and investment missions to and from targeted markets;
- Accelerate domestication of outstanding trade and economic cooperation agreements and implement market access commitments;
- Build a robust and vibrant diplomatic corps with requisite capacity to represent the country in foreign missions;
- Accelerate rationalisation and streamlining of diplomatic missions;
- Develop and implement a robust cultural diplomacy policy;
Operationalise the Development Cooperation Architecture;
Operationalise Sector Working Groups (SWGs) to improve coordination and interface with various Development Partners;
Guarantee timely payment of international commitments with respect to subscriptions and general capital increase to international organisations; and
Fully operationalise e-Government to enhance consular services.

Programmes

707. During the NDS1 Period, Government will implement an International Cooperation programme to improve international relations.

Improve Diaspora Participation in National Development

Strategies

708. The following strategies will be implemented:-

- Review the Diaspora Policy and enact the enabling legislation;
- Promote inside-out or homeland driven diaspora engagement;
- Establish formal institutional and coordination structures; and
- Establish diaspora trade and investment frameworks to promote Public Private Partnerships involving diaspora consortia.

Programmes

709. The Diaspora Engagement Programme will be implemented during the Strategy Period.
CHAPTER 11

DEVOLUTION AND DECENTRALISATION

Introduction

710. Devolution is one of the values espoused in Vision 2030, upholding the tenets enshrined in the Constitution of providing for the devolvement of powers and responsibilities to competent Provincial/Metropolitan Councils and Local Authorities.

711. Devolution seeks to make the system of governance community based and people centred by enhancing community participation in making decisions on local development issues that affect them and in the exercise of governmental powers, whilst upholding the preservation of national unity.

712. This signifies a new way of governance in the Second Republic where, decentralisation is a key feature and strategy for non-discriminatory and just governance as well as inclusive and transformative socio-economic development.

Situation Analysis

713. As early as 1984, Government pronounced the need to provide for the organisational structure that allows citizens to participate in development planning.

714. Some progress was made but not to expected levels. Resultantly, lower tier development structures were instituted from village up to provincial level and legislation was put in place to facilitate the functioning of these lower tiers of Government.
715. Empowerment of the lower tiers of Government took the form of administrative decentralisation with central Government moving the responsibility to institutions at Provincial and District levels but the institutions however, remained accountable to the centre, for the implementation of Government policies at these levels.

716. Some administrative authority was also transferred to Local Authorities, composed of Councillors elected in terms of the Urban Councils Act and Rural District Councils Act.

717. Local Authorities, which enjoy some level of autonomy are mandated to deliver basic socio-economic services. However, this mandate has been carried out in the face of administrative structural challenges such as the lack of correct delineation of roles between central Government and Local Authorities that lends itself to ineffective mandate delivery of the latter.

718. The successful devolution and decentralising of central Government powers and responsibilities to Provincial/Metropolitan Councils and Local Authorities requires that these entities demonstrate competency to carry out such responsibilities effectively and efficiently.

719. Currently, there are notable gaps in some Sub-National Governments’ capacities in executing their mandates effectively. Most capacity gaps are in the following areas:-

- Policy making;
- Absence of an enabling legal and regulatory framework;
- Spatial development planning, land surveying and Geographic Information System (GIS);
- Engineering and analysis of local services value chains;
- Designing correct cost recovery systems for delivered services;
- Conducting baseline surveys and analysis of the data;
Establishing viable revenue streams and effective revenue collection mechanisms;
Streamlining local investment with national development plans;
Capacity to develop bankable project proposals at Local Authority level;
Inadequate financial management skills; and
Preparation of revenue estimates for submission to fiscal authorities as well as generating appropriate financial statements, in approved formats, to enable audits of Local Entities to be audited in accordance with the Constitution.

720. The challenges mentioned above have affected the smooth implementation of programmes and projects under the Devolution and Decentralisation agenda.

Devolution and Decentralisation Policy

721. In 2020, Government approved the Devolution and Decentralisation Policy which will guide the implementation of the Devolution and Decentralisation process whose objective is to devolve power to the sub-national structures to enable a faster efficient and effective response to challenges of the delivery of public services, development, democracy as well as the imperative of sustaining national unity and peace.

722. The devolution will not only involve transfer of political power from central Government to sub-national tiers of Government, but will also be augmented by the delivery of fiscal powers which will enable Provincial/Metropolitan Councils and Local Authorities to spearhead economic and social development in their respective jurisdictions using leveraged local revenues which will be enhanced by mandatory transfers of national fiscal resources to devolved entities.
723. Already, Treasury has commenced transfers of not less than 5% of collected revenues to eligible sub-national tiers of Government in line with provisions of the Constitution following long periods of minimal disbursements of resources to lower tiers of Government.

724. The disbursement of the funds has resulted in the implementation of projects with high social and economic impact. These projects which were derived through extensive consultation at grassroots level covered sectors such as water, sanitation and health (WASH), infrastructure, education services as well as roads rehabilitation.

725. The thrust of the NDS1 from the devolved structures of Government will be enhanced accountability to the electorate as well as delivering of efficient public services.

**Inclusive Governance and Socio-Economic Development**

726. In order to attain improved and inclusive governance as well as socio economic development, the Devolution and Decentralisation agenda will focus on the following:—

- Enhanced democratic participation of people in decision making;
- Improved good governance and service delivery;
- Maintain Zimbabwe as a Unitary peaceful state;
- Utilise local competitive and comparative advantages;
- Stimulate economic development;
- Fiscal capacitation of the lower tiers of Government;
- Pursue cohesive policies and legislation;
- Configure Government structures at lower levels and
- Implement a new culture in the management of public affairs and resources in local government structures.

727. During the NDS1 Period, Government will implement the following: -
Maintain at least 5% of total national revenue for allocation to lower tiers of Government;

Improve governance in lower tiers of Government

Improve accountability in lower tiers of Government

*Strategies to Improve Inclusive Governance and Socio-Economic Development*

728. During NDS1 Period, the following strategies will be implemented:-

- Formulating and enactment of the necessary legal frameworks to facilitate devolution and decentralisation through:
  - Implementing policies that promote devolution;
  - Effecting necessary Constitutional amendments
  - Effecting neccessary amendments to the already existing legislation in line with the Constitution.

- Capacity building in terms of human capital, financial and ICT systems through:-
  - An efficient mechanism for resource sharing;
  - Enabling development of revenue streams and effective collection mechanisms;
  - Human capital development;
  - Strengthening of staff establishments at sub-national levels; and
  - Expansion of access to ICT systems at sub-national levels.

- Improve ease of doing business in Provinces through:-
  - Promoting ease of doing business reforms in Local Authorities; and
  - Digitalisation.

- Production of Provincial Development Plans in line with NDS1 through :-
  - Synchronizing Provincial Development Plans with National Development and Economic Plans;
Development of bankable project proposals; and
Mainstreaming the Devolution concept in all sectors of Government.

Adherence to the PFM Act regulations through:
- Capacity development on legal and regulatory frameworks;
- Auditing;
- Monitoring and Evaluation compliance with financial guidelines; and
- Enforcement of financial management policies in the usage of devolution funds.

Investment Promotion through:
- Packaging of Provincial profiles, databases, and websites;
- Promoting private sector investments within Provinces;
- Strengthening and establishment of Special Economic Zones;
- Upgrading, rehabilitation, and maintenance of existing infrastructure across all sectors;
- Construction of new infrastructure across all sectors;
- Promoting value addition and beneficiation; and
- Crafting investor friendly policies to promote devolution.

Programmes to Improve Inclusive Governance and Socio-Economic Development

729. The following programmes will be implemented in order to improve inclusive governance and socio-economic development:

- Comprehensive devolution capacity development programme informed by needs assessment;
- Upgrading, rehabilitation and maintenance of existing infrastructure across all the sectors;
- Construction of new infrastructure across all sectors;
• Promotion of value edition and beneficiation;
• Establishment and strengthening of Special Economic Zones;
• Human capital development; and
• Digitalisation.
CHAPTER 12
CROSS CUTTING ISSUES
Youth, Sport, Art, Culture and Gender Mainstreaming

Introduction

730. Youth are a valuable resource especially if they are allowed to build and strengthen qualities that enable them to grow and flourish into responsible citizens.

731. Gender mainstreaming creates a cohesive national social fabric and reduces social tensions emanating from exclusion of a large segment of the population.

732. Sport, art and culture ensure unity, influence identity, debate and dialogue. Culture is important for nation building, promotion of family value and for peace and reconciliation. They also enhance quality of life and increase overall well-being and happiness for individuals, families and communities.

Youth

Situational Analysis

733. Zimbabwe has the advantage accruing to most developing economies – the Youth Dividend. The total population is estimated at 14.8 million and growing at 1.4% per annum and a life expectancy of 61 years at birth.

734. As much as 53.6% of the population is below 20 years while 62.9% of the population is below 24 years. Of those below 24 years, 31.7% are females while 31.2% are males.

735. It has been noted that most youth in Zimbabwe have not embraced the culture of hard work and the principle that hard and honest work pays. During the NDS1
Period, there is need to develop a mental construct for the youth in respect of the importance of hard honest work and that development in other countries has been as a result of this most productive and most energetic group in society.

736. Figure 17 below shows the demographic structure of the Population in Zimbabwe.

**Figure 17: Zimbabwe Population Demographics**

![Population Pyramid Diagram](https://PopulationPyramid.net)

737. There are clear benefits for Zimbabwe to exploit both the Youth Dividend and Gender mainstreaming.

**Improving Youth Participation**

738. Policy and programme formulation need to start with a comprehensive involvement and appropriate decision-taking of youth at all levels, including communities, schools and universities at provincial and national level. The main outcomes under the Youth Participation, include:
Increasing youth participation in decision-making and development processes from 3.3% in 2020 to 25% by 2025; and
Increasing the number of youth who accessed empowerment opportunities in all sectors of the economy from 16 000 in 2020 to 200 000 by 2025.

Strategies

739. Strategies to improve youth participation during the NDS1 Period include the following:-

- Supporting youth participation in legislative and policy processes
- Enhancing leadership development training;
- Enhancing youth participation in decision-making processes at national, regional and local levels;
- Mainstreaming youth policy across all sectors of the economy;
- Reconfiguring of technical vocational education;
- Developing and modernising the VET infrastructure, machinery and equipment;
- Promoting the creation and reinforcement of synergies between the youth and Youth Development Partners;
- Developing effective enabling legal and policy framework; and
- Establishing institutional mechanism with the capacity to identify and nurture youth innovations.

Programmes

740. The following programmes will be implemented to achieve increased youth participation in development and decision making during the NDS1 Period:-

- Youth Leadership capacity development;
- Installation and support of junior councils and parliament;
- National Youth Service programme;
Youth Build Zimbabwe programme and development of Community projects;

**Women and Gender Mainstreaming**

741. Although Government has made some progress with regards to Gender Mainstreaming, the current situation is largely characterised by pronounced youth exclusion and limited Gender Mainstreaming. Women still face hurdles in respect of opportunities to ascend to commanding heights in the national economy, including:
   i. Limited access to finance;
   ii. Limited access to land and freehold property;
   iii. Limited opportunities to influence policy; and
   iv. Legal, cultural and patriarchal barriers.

742. During the NDS1 Period, priority will be accorded to Gender Mainstreaming, through visible initiatives that confer equal opportunities to women.

743. In terms of Gender, Government has prioritised gender equality in order to enhance women’s participation in the development process, in line with the Constitution, the SADC Protocol on Gender and Development, the Protocol to the African Charter on Human and People’s Rights on the Rights of Women in Africa, United Nations’ Sustainable Development Goal 5, which seeks to “Achieve Gender Equality and Empower all Women and Girls”. Women account for 52 percent of the population and their inclusion in all, Political, Economic and Social activity is critical for the attainment of Vision 2030.

744. Some of the interventions implemented in gender mainstreaming include, among others:-
   • Operationalisation of the Zimbabwe Gender Commission to spearhead the gender agenda.
Enactment and popularisation of the Domestic Violence Act, to combat Gender Based Violence.

Prioritisation of resource allocation and disbursement to women empowerment programmes.

Capitalisation of the Women’s Microfinance Bank.

Introduction and enforcement of policies for free maternal health care services, with the objective to reduce maternal mortality rates.

745. Gender equality and women empowerment remain unfinished business under the TSP and hence the NDS1 will prioritise gender issues in line with the theme of ‘leaving no-one and no place behind’.

*Strategies in Mainstreaming Gender in the Development Process*

746. During the NDS1 Period, integration of gender mainstreaming across all sectors will strengthened, cognisant that gender equality is fundamental to achieving equitable, sustainable and inclusive socio-economic development. This builds on Government’s commitment under the Constitution, the Gender Responsive Budgeting Strategy, the National Gender Policy and Gender Equality and Women Empowerment Framework.

747. Key strategies and deliverables will relate to:-

- Further mainstreaming of gender sensitive policies and legislation;
- Integrating gender issues into national and sectoral economic policies, national budget policies;
- Programming and budgeting, which involves identification of gender issues, interventions, budget costings, and setting of performance benchmarks;
- Prioritisation of resource allocation, disbursement and implementation of national and sectoral gender plans and programmes through;
Implementation of gender sensitive programmes and projects, targeting women;
and
Monitoring and evaluation, which involves tracking performance, and feedback for policy review.

During the Strategy Period, the main actors in Gender Responsive Budgeting remain, among others, Government MDAs, Parliament, Development Partners and Civil Society. Lessons learnt from the national budgetary process to mainstream gender, partnering Government in gender responsive Budget capacity building programmes will inform follow up mechanisms.

Outcomes of Women and Gender Mainsstreaming

The outcomes of the Youth and Gender Mainstreaming:
- Growing Women participation in the economy across all sectors;
- More Women in Decision Making Positions;
- Growing Women Incomes; and
- Equal Opportunities for Women.

Strategies to Achieve Gender Mainsstreaming

The following Strategies will be implemented during the NDS1 Period:
- Youth and Women Affirmative Action;
- Equal Opportunity for All Program;
- Promoting Women into Positions of Influence;
- Promoting Equality at all levels of Society;
- Advancing Women Political Representation;
- Youth and Women Advocacy Initiatives; and
- Enhancing Access to Financing for Women in Business.
Sport, Arts and Culture

Sport

751. Sport development includes regulated, formalised and structured sporting activities. Sport entails an active involvement in physical exertion and skills that is governed by a set of rules or customs and often undertaken competitively. Sport development ensures equitable access to all sporting opportunities which leads to the enjoyment of economic, social, psychological and environmental elements. This development when fully harnessed, unleashes competitive abilities of Zimbabwean sports persons to participate in local, regional, continental and international sport competitions. Sport also enhances peace, national tranquillity and social cohesion by bringing people together for a common goal and can be used to achieve and promote developmental initiatives at local, national, regional and international levels.

752. Recreation development entails the establishment of an ecosystem that allows for leisure time experiences in a structured, spontaneous or voluntary basis with flexible rules, fun, enjoyment, amusement whilst competing against self, nature or others. It contributes to nation building, a healthy nation, social cohesion, community relations, socio-economic development, peace, development of citizenship and the promotion of liveable communities amongst other areas.

753. Sports and recreation provide individuals with opportunities to improve their income, physical as well as mental well-being, development of confidence and social skills, social inclusion, community development and diversion from anti-social behaviour. Sport and active recreation provide opportunities for extended life-span and reduction in health expenditure.
In recent years, participation in sport and recreation in the country has been declining due to weak economic activity and more recently the impact of the COVID-19 pandemic.

The country has inadequate sporting and recreational facilities, and some have deteriorated due to lack of maintenance.

Increasing Participation in Sport and Recreation

During the NDS1 Period, it is envisaged that the levels of participation in sport and recreation activities will increase from 15% in 2020 to 27% by 2025.

Strategies

During the NDS1 Period, levels of participation in sport and recreation activities will be increased through the implementation of the following strategies:

- Establishment of world class sporting facilities;
- Promotion of high performance in sport by consistently awarding achievers through the National Recognition and Award System;
- Developing an integrated sport management system;
- Participating and bid to host regional, continental and international sport events;
- Commercialising sport and recreation activities;
- Developing an effective sport and recreation legal and policy framework;
- Establishing a sustainable funding model for sport and recreation, and
- Developing an incentive scheme to stimulate investment in sport and recreation.
Programmes

758. Under the NDS1 Period, the following programmes will be implemented;

- Development of an integrated sport system (school sport, NSAs, Tertiary sport, uniformed sport);
- Development of sport capacity building;
- Promotion of domestic sporting competitions and leagues to promote professionalism in sport;
- Development of a High-Performance System;
- Establishment of the Sport and Recreation Fund;
- Development of centres of excellence from district level;
- Development of a curriculum on Physical Education, and strengthening of Mass display;
- Participation at regional, continental and international platforms;
- Promotion of the bidding and hosting of sporting events;
- Development and Review of enabling Acts and Policies;
- Promotion and development of Sport and Recreation industries; and
- Refurbishment and construction of internationally recognised sporting facilities in selected provinces.

Arts and Culture

759. Culture has the power to transform entire societies, strengthen local communities, foster strong family values and forge a sense of identity and belonging for people of all ages. Culture plays an essential role in promoting sustainable social and economic development for future generations.

760. Whereas, national identity is a sense of belonging to one state or to one nation. It is the sense of a nation as a cohesive whole that is represented by distinctive traditions, culture and languages.
761. As a collective phenomenon, national identity can arise as a direct result of the presence of elements from the "common points" in people's daily lives. These include national symbols, music, language, the nation's history, national consciousness, and cultural artefacts.

762. The expression of one's national identity seen in a positive light is patriotism, which is characterised by national pride and positive emotion of love for one's country. This is a cross cutting outcome in the priority area. The programmes in youth, sport and culture all contribute towards improved social cohesion, sense of national identity and pride.

763. The objective during the NDS1 Period is to increase the level of local consumption of cultural, sport and recreation products and services from 15% in 2020 to 40% by 2025.

Strategies

764. In order to increase promotion and safeguarding of arts, culture and heritage, the country needs effective strategies that provide the framework for how to understand, preserve, manage, integrate, interpret and promote heritage and strengthen family values both in the immediate and long term future.

765. The following strategies shall be adopted:
   - Enhancing investment in local cultural resources including tangible and intangible heritage such as traditional knowledge and skills, as well as music, dance, theatre and festivals;
   - Develop sustainable creative economies;
   - Promoting creativity and harnessing people’s creative potential and energy;
   - Building research and documentation capabilities for arts, culture and heritage;
Establishing and equipping new arts, cultural and heritage centres and rehabilitation of existing ones;

Promotion and Coordination of development, marketing and management of arts culture and heritage centres, products, goods and services;

Commercialising arts, culture and heritage activities and training;

Institutionalising cultural data creation and data capturing systems;

Aligning and enacting of laws governing the Cultural and Creative Industries (CCIs);

Establish an institutional mechanism with the capacity to identify and nurture Cultural and Creative Industries’ talent, innovations and creativity;

Adornment of Government and Zimbabwe’s foreign mission buildings to improve on the development of cultural infrastructure;

Develop, promote and safeguard arts, culture and heritage products and services;

Promote investment in Film and Audio-visual, Music, Theatre and Visual Arts for commercialisation and industry growth; and

Establish Creative Community Hubs and Clubs.

Programmes

766. During the Strategy Period, Government will continue to support the Arts and Culture sector through implementing the following programmes: -

- Develop infrastructure for Arts, Culture and Heritage;
- Conduct Arts and Culture Festivals (District, Provincial, National, Regional, International);
- Establish Arts and Culture Development Fund;
- Establish provincial Arts and Culture Hubs and Community Clubs; and
- Review and realign existing Policies and Legislation.
Financial Inclusion

Situation Analysis

767. Financial inclusion is key in promoting inclusive growth by providing access to financial services, loans, credit and insurance, thereby allowing them to engage in gainful economic activity. Zimbabwe has been implementing the National Financial Inclusion Strategy (2016-2020), through various initiatives targeting previously marginalised segments. The financial inclusion gains that have been made were, however, threatened by the outbreak of COVID-19.

Outcomes of Financial Inclusion

768. Financial inclusion has multiple benefits, which include conferring opportunities to the traditionally unbanked, thus lifting households out of abject poverty thereby promoting transformative and inclusive growth. Improving financial inclusion will entail increasing the percentage of financially included persons from 77% to 90% by 2025.

Strategies to Achieve Financial Inclusion

769. The ongoing digitalisation of financial services on the back of rapid advancements in ICTs and the accelerated evolution of Fintech and Techfin platforms have created a wider scope for deepening financial inclusion. The momentum for financial inclusion has also gained pace, reflecting the prevalence of ICT based new products and channel offerings.

770. To ensure that the marginalised groups of society are financially included, and can fully participate in various economic activities, Government will promote ICT driven innovation and innovation hubs across key sectors of the economy.
771. The confluence of banking and financial services and ICT has created the potent for new wealth creation through the provision of credit and other financial intermediation services. Notably, savings and credit cooperatives (SACCOS) have become an avenue for mobilising resources among the previously under banked.

772. Key programmes under financial inclusion include the following: -
- Youth and women empowerment;
- Financial access; and
- Savings mobilisation.

Social Protection, Poverty Alleviation and Safety Nets

Introduction

773. Effective social protection and safety nets, policies, systems and programmes play a major role in reducing poverty and vulnerability, redressing inequality, promoting inclusive growth and development of human capital, which will lead to the attainment of Sustainable Development Goal 1, Target 1.3.

774. Zimbabwe identifies and advocates for the need to provide social protection to its citizens as provided in Section 30 of its Constitution which states that "... the State must take all practical measures, within the limits of the resources available to it, to provide social security and social care to those who are in need".

775. The Constitution also contains an inclusive Bill of Rights which underscores the provision of social protection. The Bill of Rights further places prominence on equality of opportunities and non-discrimination as well as empowerment and employment creation with special focus on children (including orphans and
vulnerable children), the elderly, and persons with disabilities, women and the youth as well as veterans of the liberation struggle.

776. Accordingly, guided by the National Social Protection Policy Framework (NSPPF), NDS1 will continue to implement appropriate social protection systems through provision of social assistance, social insurance, social support and care services, livelihoods support as well as labour market interventions.

**Situation Analysis**

777. Poverty and vulnerability have been deteriorating in the past decades mainly due to droughts, cyclones and floods which exposed a number of citizens to food insecurity, hunger and starvation. The number of people under the food poverty line have increased from 3 million people in 2011 to about 6 million in 2019 and is expected to reach between 7.6 to 8 million in 2020.

778. Urban vulnerability is a new phenomenon coming up proving that it is not only those in the rural areas who are in need of assistance. The situation has exacerbated by COVID 19 pandemic Social exclusion with regards to access to basic social services and other public goods remains high.

779. The social protection system which once ranked impressively in coverage and other measures, recent crises and structural challenges have eroded its quality and reach. About half of the food poor receive no benefits from any of the social assistance programs. Key challenges include the following:-

- Lack of fiscal space to cover all in need;
- Weak coordination of the country’s humanitarian response and furthering corruption in access to support and exclusion of disenfranchised groups;
- Poor monitoring and accountability systems for resources allocated towards social protection;
- Lack of stakeholder coordination initiatives by different players resulting in double dipping by some beneficiaries;
- Inadequate capacities, to implement legal and policy frameworks that guarantee protection of vulnerable groups.
- Fragmented and silo-based approach to social protection with multiple programmes with limited reach;
- Weak underlying delivery systems, including the lack of Management Information Systems (MIS); and
- Lack of Specialised Protection Systems for children leading to increased child marriages, child labour, school drop-outs, drug and substance abuse.

780. Addressing the above challenges during the NDS1 Period will ensure that quality and affordable social protection services are availed to all those in need and various strategies, programmes and interventions have been identified.

**Quality and Affordable Social Protection**

781. During NDS1, Government will ensure availability of social protection for all. This will entail undertaking measures that will improve access to inclusive social protection.

**Reducing Extreme Poverty and Improving Access to Basic Social Services.**

782. Inflationary pressures, contraction in economic activity and the outbreak of the COVID-19 pandemic have exposed livelihoods of many Zimbabweans. In relative terms extreme poverty rose mostly in urban areas while in absolute terms, rural extreme poverty remains much higher than urban.
783. The objective of NDS1 is to reduce extreme poverty and improve access to basic social services in all its forms and dimensions, including narrowing inequalities. Specifically, the NDS1 by 2025, will seek to fulfil the following:-

- Reduce the number of people below the food poverty line;
- Increase the number of people (men, women, persons with disabilities and children of all ages) receiving social assistance across all the social protection interventions from 65% in 2020 to 85% by 2025;
- Increase proportion of population with access to social care and support services from 15% in 2020 to 75% by 2025;
- Increase social insurance cover to 67% by 2025; and
- Increase Livelihoods support from 3% to 17% by 2025.

Strategies to Improve Access to Basic Social Services

784. In order to reduce extreme poverty and improve access to basic social services, NDS1 will harmonise, integrate and strengthen social assistance programmes.

785. Appropriate targeting of the vulnerable groups will be prioritised so as to ensure they receive the much needed and relevant social assistance.

786. Further, NDS1 will scale up the provision of inclusive social assistance through rationalisation of beneficiaries to target deserving vulnerable groups.

787. Expansion of existing but modified and new social assistance programmes in urban areas will be enhanced to address rising urban poverty and vulnerability, thus ensuring universal coverage.

788. The Strategy will develop and strengthen social protection delivery systems particularly improving on the payment system and Management Information System (MIS).
789. In addition, measures to improve the grievances handling mechanism, shock responsiveness, monitoring and evaluation as well as improved communication will be implemented.

790. In order to improve social protection during the Strategy Period, Government will enhance its coordination mechanisms through the re-establishment of the National Social Protection Steering Committee (NSPSC).

Programmes and Projects

791. During NDS1, several programmes, projects and interventions will be implemented to reduce extreme poverty and improve access to basic social services across the life-cycle of vulnerable groups as follows:-

- Provision of food assistance, social cash transfers, health assistance, holistic education support including school feeding and provision of sanitary wear for female learners in schools;
- Provision of discretionary assistance in funeral and transport assistance;
- Support towards disaster preparedness and response programmes to build resilience in communities; and
- Strengthen social protection delivery systems inclusive of shock responsiveness.

Improving Care and Protection of Vulnerable groups

792. Vulnerable groups need to be protected and these include persons with disabilities, children and the elderly. These need to be cared for and accordingly, NDS1 will ensure these groups are taken care of through new interventions and modification of existing programmes.

793. The aim for improved care and protection of vulnerable groups is to:-

- Increase the number of people receiving care and protection within set standards from 15% to 75%;
- Decrease proportion of the population that are subjected to all forms of abuse disaggregated by gender, age among others from 35% to 10%; and
- Increase proportion of victims of violence who reported their victimisation to responsible authorities from 5% to 30%.

**Strategies to improve Care and Protection of Vulnerable groups**

794. To ensure improved care and protection of the vulnerable groups, NDS1 will strengthen and coordinate mechanisms and enhance stakeholders’ engagement so as to build social cohesion. There will also be building of inclusive and sustainable livelihoods opportunities for the poor and vulnerable groups to build resilience.

795. Strengthening policy and legislative frameworks is another strategy that will be employed whilst an integrated case management system and child protection services will be enhanced.

796. During the Strategy Period, Government will also provide platform for CSOs to monitor the implementation of social service delivery programmes in the country.

**Programmes and Projects**

797. In order for the NDS1 to achieve improved care and protection of vulnerable groups, deliberate support will be extended to the vulnerable groups through the following:
- Introduction of old age and children grants;
- Women and youth empowerment programmes; and
- Market linkage programmes for empowerment interventions.

798. In addition, Government will scale up the following:
- National Case Management for the care and protection of children;
- Expansion of child protection services;
- Promotion of adoption and foster care;
Registration and monitoring of Private Voluntary Organizations and Residential child-care Institutions;
- Information, Documentation, Tracing and Reunification of children living outside the family environment;
- Provision of probation services; and
- Support safe spaces for pregnant women at Maternity Waiting Homes including provision of food.

**Improving livelihoods for the Poor and Vulnerable**

799. During the Strategy Period, Government will implement measures to improve livelihoods for the poor and vulnerable. The target will be to:-
- Increase the number of people with improved resilience (adaptive, absorptive, transformative) and disaggregated by gender, age and disability from 2% to 10%;
- Increase number of households supported with livelihoods initiatives from 5% to 25%; and
- Increase number of households with improved source of livelihoods from 2% to 15%.

**Strategies for Improving Livelihoods for the Poor and Vulnerable**

800. To improve livelihoods, NDS1 will enhance inclusive and sustainable livelihoods opportunities for poor and vulnerable groups.

801. During the Strategy Period, community-based feedback mechanism to track the impact of social service delivery programs will be developed.

**Programmes and Projects**

802. For inclusive and sustainable livelihood opportunities for vulnerable groups there will be enhanced support towards livelihoods activities:
Community Capacity Building for self-sustenance;
growth of micro-small-medium enterprises and beyond through promoting value chain linkages;
Linking small scale producers to relevant markets;
Timely provision of inputs to vulnerable farmers to promote food security;
Scale up youth empowerment and self-help programmes including for survivors of gender based violence and persons with disabilities to improve their livelihoods; and
Capacitation of probation centres to ensure rehabilitation of children in conflict with the law.

**Enhancing Job and Income Security**

803. The majority of workers are at the very bottom of the economic and social ladder and working under precarious conditions. They thus suffer from a deficit of decent work, with its defining characteristics that they are unprotected, excluded, unregistered and unrepresented. NDS1 will endeavor to ensure there is enhanced job and income security for the next 5 years.

804. In order to achieve job and income security and protection, Government will increase the coverage of social insurance for both formal and informal sectors.

*Strategies*

805. Strategies to enhance income security during NDS1 will include development and implementation of unemployment benefits scheme to cater for those who are unemployed so that they are protected as they seek to be employable.

806. Notwithstanding the economy being highly informalised, the National Social Security Authority has over the years targeted the formally employed. During NDS1 period, development of social security schemes targeting the informal sector will be accelerated.
807. Economic instability has eroded pension savings rendering most beneficiaries relatively poor. During NDS1, pension reforms will be accelerated to facilitate preservation of pension value, whilst mechanisms for portability and harmonization of social security benefits will be implemented.

808. Government will develop and implement the National Health Insurance Scheme to cover all citizens, which will entail moving away from the current Assisted Medical Treatment Order (AMTO).

Programmes and Projects

809. To enhance job and income security, the following programmes will be implemented:
- Expansion of social insurance and social security coverage to cover the informal sector.
- Alignment of Labour laws to the Constitution; and
- Equipping Rehabilitation centres to take care of those injured at work.
Environmental Protection, Climate Resilience and Natural Resources Management

Introduction

810. Environmental protection, climate resilience and natural resources management are key enablers for the attainment of vision 2030 and the Sustainable Development Goals (SDGs). The Global Agenda on Sustainable Development Goals 11, 12, 13, 14, and 15 speak to environmental protection and target climate resilience, sustainable production and consumption, sustainable use of both terrestrial and aquatic ecosystems, reversing land degradation, and addressing bio-diversity loss.

811. This is in line with citizens’ environmental rights enshrined in Section 73 of Zimbabwe’s Constitution. Therefore, considering the centrality of this sector to the attainment of a prosperous and empowered upper-middle income society, it is imperative that the environment is sustainably managed for current and future generations.

Environment and Climate Protection

Situation Analysis

812. Despite being guided by a robust legal, policy and institutional framework, and having high level of biodiversity with global significance, Zimbabwe is experiencing increasing environmental challenges which include water, land and air pollution, littering, mushrooming of illegal waste dumps, siltation, illegal mining, veld fires, deforestation, climate change, poaching and biodiversity loss.

813. Climate change has increased the frequency of extreme weather conditions such as drought, floods, storms and heat waves. Notable weather catastrophes include the
Tugwi-Murkosi floods of 2013-2014, which led to the displacement of thousands of communities in Masvingo and the recent Cyclone Idai disaster in 2019.

814. On the other hand, the country’s wetlands have come under severe pressure from development as the demand for housing and water increases. As a signatory to the Ramsar Convention on Wetlands of 1971, the country has obligations to ensure wetlands are sustainably managed to ensure their regenerative capacities are not impaired and they continue to provide essential ecosystem services.

815. The productive sectors namely mining, energy, manufacturing, agriculture and tourism rely heavily on the environment for inputs to the production of goods and services. The increase in demand of environmental goods and services and the lack of sustainable alternatives has resulted in a number of daunting environmental challenges. Climate change tends to increase pressure on natural resources, impact ecosystem services and agricultural productivity. As a result, the poor are disproportionately affected.

816. Further, the country’s cities are the biggest polluters, poisoning rivers, dams and underground water with germ-laden sewage, industrial waste and small-scale miners dumping the worst poison mercury. Nationwide, council water sources are the most polluted and amongst the most polluted water bodies are Lake Chivero, Khami and Umguza dams, Odzi and Dora Rivers in Mutare, Darwendale and Biri dams.

817. However, while the general environmental outlook shows a reduction in both the quality and quantity of environmental resources, there has been a general improvement in the strategies and coordination in the sector. Successes include the following:-
(i) The National Clean-up Programme that was launched by His Excellency the President inculcating a culture of increased cleanliness across the various cities and towns with corporate entities infusing into initiatives for the recycling of waste;

(ii) The recent ban on alluvial mining and mining in protected areas; and

(iii) The continued observance of environmental days such as tree planting at the highest level.

**Protected Environment**

818. The rate of natural resources depletion and environmental degradation is affecting environmental sustainability which further impoverishes the vulnerable groups. If changing climatic conditions continue, traditional agricultural systems will become increasingly unsustainable therefore, environmental protection will be prioritised during the NDS1 strategy period.

819. The main objectives under national outcome of a Protected environment are to:-

(i) Increase the areas of wetlands sustainably managed from 701 100 hectares in 2020 to 1051 650 hectares by 2025;

(ii) Reduce area burnt from 1 100 000 in 2020 to 6 000 by 2025; and

(iii) Increase mined areas rehabilitated from 2 500 hectares in 2020 to 10 000 hectares by 2025.

**Sector Outcomes**

820. In order to achieve a national outcome of a Protected Environment by 2025 there is need to improve the health of ecosystems and climate action. Therefore, the following sector outcomes will be pursued under NDS1 strategy period to protect the environment:

(iv) Improved ecosystems health; and
(v) Improved Climate Action.

**Improved Ecosystems Health**

*Strategies*

821. In order to achieve improved ecosystems health, the following strategies will be implemented during NDS1:-

- Reviewing the policy and legal framework for sustainable management of sensitive ecosystems;
- Mapping, gazetting, adoption and protection of sensitive ecosystems;
- Capacitate environmental protection institutions to restore and protect degraded landscapes and catchment areas including ground water;
- Engage communities on issues of sustainable mining, sand abstraction, brick moulding and stream bank cultivation to address land degradation and pollution;
- Enhancing and enforcing local by-laws;
- Promoting research and development, education, training and awareness;
- Promoting recycling initiatives;
- Strengthening Local Level Fire Management Committees and environmental information management systems;
- Enforcing laws for the rehabilitation of mined areas;
- Strengthening monitoring and environmental assessments;
- Capacitating local authorities to manage the environment;
- Upgrading waste management infrastructure;
- Promoting sustainable consumption and production;
Implementing current internationally funded programmes and projects; and
Ratification, domesticating, implementing and monitoring Multilateral Environmental Agreements.

Programmes

822. During the NDS1 Period, Government will promote implementation of the following programmes in order to improve ecosystems health:-
- Land and Ecosystems Management and Protection;
- Rivers and Catchment Area Management; and
- Pollution and Waste Management.

Improved Climate action

823. Changes in weather patterns have limited agricultural potential in arid environments, particularly for maize, the country’s staple crop which is highly sensitive to water stress. Weather information dissemination is critical to all sectors of the economy therefore climate action will be prioritised during the NDS1 strategy period.

Strategies to achieve Improved Climate Action

824. The following strategies will be implemented for improved climate action:-
- Prioritising the mainstreaming of climate change and related financing in all national programmes;
- Strengthening early warning systems;
- Promoting climate smart innovations and technology transfer;
Strengthening capacity building and awareness on climate change adaptation and mitigation;
Upgrading meteorological radar seismology and weather station network;
Implementing disaster risk management;
Cloud seeding;
Promoting low emissions development pathways; and
Promoting the reduction of greenhouse gases and alternative energy solutions.

Programmes

825. To improve climate action, the following programmes will be implemented: -

- Weather, Climate and Seismology;
- Climate Change Adaptation; and
- Climate Change Mitigation.

Sustainable Natural Resources Utilisation

Situational Analysis

826. Zimbabwe prides itself among the best in environment and natural resource management within the region. The country has about 12.3 percent of its land being protected National Parks and about 2.6 percent being State Forests. Over and above these, there are community and privately owned conservation and plantation areas which significantly increase the total area under some form of protection.
827. However, there has been a worrying reduction in both the quantity and quality of natural resources emanating from increased pollution, land degradation, deforestation, over exploitation, land use changes, siltation of rivers and water bodies as well as climate change. This reduction in quality and quantity of natural resources has a negative bearing on the country’s socio-economic development and other sectors, especially tourism which depends heavily on these resources.

828. The forestry and wildlife sectors, which includes fisheries, have also been affected by the declining quantity and quality of environmental resources. Timber plantations and most wildlife areas have been negatively affected by illegal activities, over exploitation, veld fires, land use changes and poaching.

829. Efforts to address these challenges have been affected by resource constraints. The country has not benefitted from major windows of financing as a result of international restrictions. International bans on the exportation of certain biological resources such as wildlife products has affected conservation programmes.

830. On the other hand, the rural areas are highly vulnerable to environmental shocks and characterized by low levels of resilience. In this regard, communities were engaged in community based natural resources management programmes such as the CAMPFIRE programme. The reduction in benefits from these initiatives has resulted in human wildlife conflicts, land use changes and negative perceptions.

Outcomes for Sustainable Natural Resources Utilisation

831. Forests contribute to the conservation of Zimbabwe’s rich biodiversity, concentrated mainly in designated parks and forest reserves, representing a major attraction to the tourism sub-sector.

832. The objective under improved biodiversity is to: -
Increase planted area from 11,500 hectares to 45,000 hectares by 2025; 
Increase the National Forest cover from 44.5% in 2020 to 47% by 2025; and 
Increase the number of keystone species.

**Sector Outcomes**

833. The following sector outcomes will be implemented under NDS1 strategy period:

(i) Increased forest production and processing; and 

(ii) Improved status of Protected Areas.

**Increasing Forest Production and Processing**

**Strategies to increase Forest Production and Processing**

834. The following strategies will be implemented during NDS1 in order to achieve increased forest production and processing: -

- Reviewing and implementing Forestry policies and legislation;
- Intensifying implementation of the tobacco wood energy programme;
- Developing and implement ecosystem service incentives and strategies;
- Conducting forest inventories;
- Promoting the establishment and development of commercial plantations;
- Promoting Value addition;
- Managing woodlots and tree planting;
- Increasing area under forest and tree planting by commercial plantations;
- Strengthening biodiversity information management;
- Strengthening research and technology development;
- Addressing illegal land use change; and 
- Implementing environmental valuations and satellite accounting.
Programmes

835. To increase forest production and processing a Forest Restoration Programme will be implemented during the NDS1 Period.

Improving Status of Protected Areas

836. Protected areas are the hallmark of Zimbabwe conservation efforts. Improving their protection status will not only assist the country to attain vision 2030, but will significantly impact on other sectors such as tourism and fisheries.

Strategies to achieve Improved Status of Protected Areas

837. To improve the status of protected areas, the following strategies will be implemented during the NDS1 Period: -

- Engaging local, regional and international communities to unlock value of wildlife;
- Improving fisheries management and utilisation;
- Valuating protected areas;
- Improving Transboundary collaborations and Joint law enforcement;
- Creating community wildlife conservancies and partnerships;
- Completing and implement reviewed Communal Areas Management Programme for Indigenous Resources (CAMPFIRE);
- Aligning Policies and legislation for wildlife management with the constitution;
- Developing and implementing key species and protected area action plans;
- Implementing natural capital accounting;
- Strengthening research and development;
- Implementing habitat conservation and Integrated land use planning;
- Increasing the total area under conservation; and
- Maintaining the integrity of protected areas by increasing investments and improving infrastructure.
Programmes

838. To improve the status of protected areas the following programmes will be implemented:

(i) Protected Area Management; and

(ii) Community Based Natural Resources Management (CBNRM).

Governance

Introduction

839. Good Governance is the process whereby public institutions conduct public affairs, manage public resources and guarantee the realisation of human rights in a manner essentially free of abuse and corruption, and with due regard for the rule of law. The rule of law is the restriction of the arbitrary exercise of power by subordinating it to well defined and established laws.

840. The overarching objective of the Governance National Priority Area during the Strategy Period is to improve Public Service Delivery, Justice Service Delivery and uphold National Unity, Peace and Reconciliation as the building blocks for achieving equitable and sustainable National Development.

Public Service Delivery

Situational Analysis

841. The delivery of public services in Zimbabwe is mainly through the Central Government, Local Authorities, and State Enterprises and Parastatals (SEPs). These public entities combined account for approximately 50% of GDP.
842. These key institutions combined employ the greater proportion of those formally employed. However, this has not translated into improved performance, productivity, or improved service delivery.

843. Public service delivery has been affected by a number of factors such as high levels of human capital attrition, poor services delivery by Local Authorities and SEPs, and the high cost of doing business.

844. Zimbabwe has 32 Urban Councils and 60 Rural District Councils, which play a crucial role in public service delivery. However, efficient provision of services by Local Authorities has been compromised due to the following challenges:

- Corruption, particularly in the sale of land;
- Rapid and uncontrolled urban migration, which stresses the existing infrastructure;
- Financial imbalances and capacity constraints resulting in inadequate funding for operations;
- Erosion of Local Authorities budgets due to inflationary pressures;
- Debt-overhang by Local Authorities, which constrains their capacity to access loans; and
- Ineffective role delineation structure.

845. SEPs play a pivotal role in the provision of services as key enablers or regulators. In 2017, SEPs represented about 14 percent of the country’s GDP, with commercial SEPs contributing about 7.5 percent, against a potential of over 40%.

846. Despite the critical role of SEPs, corruption, poor financial and operational performance, ineffective monitoring and evaluation, and poor corporate governance have limited their potential to deliver services. This has resulted in most of them
incurred significant losses, accumulating short-term debt and arrears, resulting in loss of equity.

847. The entities are also faced with high levels of human capital attrition attributed to low salaries and loss of value of the local currency and this has also impacted negatively on effective public services delivery.

848. Government, during the NDS1 Period, will prioritise enhancement of service delivery. The main objective under the NDS1 Period will be to increase the Citizen Satisfaction Index from 60% in 2020 to around 70% by 2025.

**Key strategies to Enhance Public Service Delivery**

849. In order to enhance public service delivery during the Strategy Period, Government will implement the following strategies:-

- Institute broad based public sector reforms;
- Review functions of all MDAs for purposes of aligning them to fit for purpose;
- Devolving and decentralising power and responsibilities to lower tiers of Government;
- Promotion of new work culture that is able to produce cadres who are loyal, patriotic, professional, ethical, high performance oriented and accountable;
- Strengthening enforcement of procurement legislation through the Procurement Regulatory Authority of Zimbabwe (PRAZ);
- Accelerating SEPs reforms processes that include privatisation, commercialisation and integration;
- Strengthening enforcement of the Public Entities Corporate Governance Act; and
- Centralising the administration and housing of SEPs shareholding under a new professional and competent entity.
Programmes to Enhance Public Service Delivery

850. To achieve enhanced public service delivery, Government will implement the following key programmes:-

- Human Capital Management and Development;
- Pay and Benefits Development; and
- Public sector reforms inclusive of SEPs.

Transparency and Accountability

Strategies

851. In order to improve the country’s transparency and accountability, Government will implement the following strategies:

- Strengthening institutions of accountability (Auditor General, Zimbabwe Anti-Corruption Commission, National Prosecuting Authority and Judicial Service Commission) while ensuring their impartiality,
- Strengthening the benefits and sanctions mechanism, and implement anti-corruption mechanisms (prevention, reporting and prosecution mechanisms) across the board,
- Accelerating implementation of an integrated e-Government system, including alignment of the PFM legal framework with Zimbabwe’s Constitution,
- Strengthening fiscal transparency through budgeting and expenditure reforms,
- Strengthen the oversight role of Parliament and the Auditor General’s Office,
- Strengthen enforcement and compliance with good corporate governance principles within Local Authorities and SEPs, and
- Strengthen financial oversight of Local Authorities and SEPs.
To achieve enhanced transparency and accountability, Government will prioritise implementation of the following programmes:

- Public Accounting, Compliance and Reporting enhancement; and
- Legislative and oversight enhancement.

**Disaster Risk Management**

**Strategies**

853. In order to achieve improved disaster risk management, the following strategies will be implemented:

- Capacitating the Civil Protection Department;
- Promoting linkages between the Meteorological Services Department and the University of Zimbabwe for utilisation of the High Performance Computer;
- Establishing and implementing a citizen feedback mechanism; and
- Strengthening provision of psycho-social support mechanisms in the aftermath of disasters for affected communities, to reduce post disaster trauma.

**Programmes**

854. The following programmes will be implemented in order to improve disaster risk management:

- Disaster Risk Management;
- Public Health Care;
- Defence and Security; and
- Weather, Climate and Seismology Services.
855. In order to improve consumer satisfaction levels, Government shall adopt the following strategies:

- Strengthening enforcement of relevant legislation and policies; and
- Strengthening advocacy and awareness campaigns on consumer rights and protection.

Programmes

856. Government will implement the following programmes:

- Consumer Protection; and
- Quality assurance.

Ease of Doing Business

857. The country’s doing business environment has for long been unfavorable due to deteriorating national competitiveness, macroeconomic and financial sector instability, among others. However, overall doing business environment has been gradually improving as shown in Figure 18 below.
In order to improve the business environment during the Strategy Period, the following strategies will be implemented:

- Accelerate Ease of Doing Business reforms; and
- Aligning and implementing relevant laws and policies.

Programmes to Enhance Ease of Doing Business

To achieve the outcome of enhanced ease of doing business during the Strategy Period, Government will strengthen implementation of the following programmes:

- International Trade Facilitation; and
- Ease of Doing Business Reforms.
Justice Delivery

Situational Analysis

860. Over the last five years, the country has taken steps to align provisions of the Constitution as well as domesticate international and regional obligations to allow citizens to benefit from the provisions of the amended Constitution. To date, 350 out of 396 laws have been aligned to the Constitution.

861. The country has successfully reported during the first and second cycles to the UN Human Rights Council under the Universal Periodic Review (UPR) mechanism, agreeing to implement a litany of over 300 civil, political, economic, social, cultural, and environmental rights recommendations for both cycles.

862. The Judicial Service Commission (JSC) successfully completed the separation of the Constitutional Court and the Supreme Court in line with the Constitution to ensure autonomy and improve efficiency and access to justice for all.

863. Corruption is a major stumbling block in the delivery of public services. Consequently, the country is ranked lowly at 158 out of 180 countries, according to the 2020 Corruption Perception Index.

864. The following work to improve justice delivery, however, remains outstanding:
   - Alignment of the remaining 46 pieces of legislation to the Constitution;
   - Decentralisation of the Legal Aid Directorate to district level;
   - Establishment of the High Court and specialised Courts in all Provinces;
   - Construction of additional Courts in small towns and remote areas as well as revamping of outstanding court rooms to make them accessible to persons with disabilities;
   - Implementation of the Intellectual Property Policy and Strategy;
   - Continued decongestion of prison population; and
   - Revamping of police and prison holding cells to meet best practices.
865. Challenges as well as constraints, however, remain and these relate to inadequate financial support to key institutions responsible for ensuring good governance, rule of law and protection and promotion of human rights. There is also low citizen participation in democratic and governance processes as well as high levels of corruption.

866. The NDS1 seeks to achieve the national outcome of improved justice delivery. The main objective under improved justice delivery is to improve the country’s Rule of Law Index ranking from 116 in 2019 to around 100 by 2025.

Strategies

867. Government during the NDS1 Period, will prioritise improving the rule of law through complying with the Judicial Court Decisions and strengthen rule-based governance.

868. To promote access to justice during the Strategy Period, Government will implement the following strategies:

- Strengthen state institutions responsible for Justice Delivery.
- Decentralise state institutions responsible for Justice Delivery (Legal Aid Directorate and courts);
- Establish integrated electronic case management system;
- Review and rationalise legal costs;
- Improving access to courts by people with disabilities;
- Improve access to justice for vulnerable people and those from minorities;
- Continued capacitation of the justice delivery system;
- Government will review and simplify courts procedures;
- Professionalisation of the security services; and
- Alignment of legislation to the Constitution.

869. The following programmes will be implemented to improve justice delivery:-
Access to Justice;
Institutional Capacitation;
Adherence to Rule of Law;
Human Rights Protection and Promotion; And
Human Rights Promotion and Administrative Justice.

Human Rights and Freedoms

Strategies

870. The following strategies will be implemented during the Strategy Period:
- Strengthening capacity of Independent Commissions to deliver on their mandates,
- Domesticate and comply with international and regional human rights obligations,
- Setting up an Independent Complaints Review Commission (ICRC) to ensure that all citizen complaints against the police, army and other security agents are investigated independently and expeditiously.

Programmes

871. The following are the programmes for improved human rights and freedoms:
- Human rights protection and promotion; and
- Human Rights promotion and Administrative Justice.

Combating Corruption

872. During the implementation of the NDS1, Government shall reduce corruption by ensuring speedy prosecution and resolution of all corruption cases.
873. Further, Government shall capacitate institutions of transparency and accountability such as ZACC, National Prosecuting Authority and the Zimbabwe Republic Police as well as the Judiciary to ensure uncompromised implementation of justice.

874. During the NDS1 Period, a system shall be put in place to protect whistle blowers who report corruption through enacting an Act of Parliament on the protection of whistle blowers.

875. Government shall also implement the anti-corruption strategy and enforcement of assets forfeiture. The following programmes will be prioritised to combat corruption:
   - Public Prosecution and Asset Forfeiture; and
   - Combating corruption.

**Secure Property Rights**

876. Respect for property rights is a key enabler to unlocking investment potential in the country. In this respect, Government shall accelerate digitalisation of the property and proprietary registration system under the Deeds Office, strengthening the regulatory environment and protection of property rights and establish a secure agriculture land tenure system.

**Public Safety and Order**

877. To improve public safety and order in the country, Government shall strengthen capacities of law enforcement agencies and other relevant institutions.

879. Further, implementation of smart policing in line with global adaptation of new technologies that reduce human interference such as adoption of technological devices, including but not limited to drones, cameras and Closed Circuit Televisions, will be pursued.
National Unity, Peace and Reconciliation

Situational Analysis

880. Zimbabwe has experienced conflict and, in some instances, violent conflicts before and after independence which have negatively impacted on social cohesion within communities.

881. In order to address the legacy issues of conflicts, Government established the National Peace and Reconciliation Commission (NPRC).

882. Significant progress has been made in ensuring peace and reconciliation. However, the country continues to face some challenges related to unresolved historical and current conflicts leading to polarisation.

883. Cognisant of the 10 year Constitutional lifespan of the NPRC, sufficient resources will be availed for the Commission to expedite and resolve all outstanding conflicts.

884. The main objective under improved national peace and reconciliation outcome is to increase the number of incidents of conflicts reported and resolved from 530 in 2020 to 1 000 by 2025.

Social Cohesion

885. During the Strategy Period, the outcome of improved social cohesion will be achieved through the following strategies:

- Promotion of inclusive dialogue and tolerance among citizens;
- Promotion of peace building initiatives among communities;
Strengthen citizens’ engagement through establishment of Local Peace Committees; and

Uphold and promote the Constitution as a form of social contract.

886. To achieve the outcome of improved social cohesion outcome, Government will implement the National Peace and Reconciliation Programme.
CHAPTER 13

NDS1 FINANCING

887. Successful implementation of the NDS1 including attainment of the targeted National and Sectoral Outcomes hinges on the ability to mobilise financial resources required for the execution of planned programmes and projects.

888. In this regard, various financing strategies and options will be aggressively pursued to ensure timely availability of resources during the Strategy Period. Possible financing options underpinning the NDS1 include fiscal revenues, loans, grants, public entities own resources and private sector own resources, including PPPs, FDI and Diaspora Investments.

889. The various strategies under Image Building, Engagement and Re-Engagement drive and initiatives on arrears clearance, are critical in unlocking resources from Development Partners and the Private sector.

890. Furthermore, various investment initiatives will be pursued through the operationalised Zimbabwe Investment and Development Agency (ZIDA). Investment will also benefit from accelerated and intensified implementation of the Ease of Doing Business Reforms and policies towards cost reflective user and tariff charges.

891. During the Strategy Period, implementing agencies will be required to develop bankable projects that are key in attracting private sector funding for infrastructure projects coupled with capacity building reforms aimed at strengthening the Public Investment Management architecture.
892. Implementation of Macro-economic stabilisation measures outlined in this Strategy also provides a solid foundation for resource mobilisation and predictable cash flows that allow efficient and effective implementation of programmes and projects. Additionally, the domestic financial market will be capacitated to provide affordable and long term financing at concessionary terms.

893. A compendium of duly costed and high impact programmes and projects earmarked for implementation during the Strategy Period will be outlined in the NDS1 Programmes and Projects Investment Plan.
CHAPTER 14

NDS1 MONITORING AND EVALUATION

Introduction

894. The attainment of an upper middle-income status under Vision 2030 is backstopped by the National Monitoring and Evaluation Policy (NMEP) that was developed by Government in 2020.

895. The robust monitoring and evaluation policy framework is anchored on the principles of IRBM, where developmental results, as outlined in the National Development Results Frameworks (NDRFs) and Sectoral Development Results Frameworks (SDRFs) will be monitored throughout the NDS1 implementation period.

896. Further, emphasis will be on high performance and delivery of quality services to the Zimbabwean people. Through the NMEP, all MDAs are to mainstream Results-Based Monitoring and Evaluation (RBM&E) in the implementation of programmes and projects for the successful attainment of the NDS1 targets.

Implementation, Monitoring and Evaluation of NDS1

897. The NDS1 M&E framework is drawn from the National and Sectoral Development Results Frameworks, which outline National Priorities, Key Result Areas, Outcomes, Key Performance Indicators (KPIs), Baselines and Targets. The RBM&E will place greater emphasis on measurement of livelihoods and economic transformative results, that is, outputs, outcomes and impacts. It will take cognisance of the use of inputs and completion of activities as the programmatic entry points.
During the NDS1 Period, the RBM&E framework will ensure that cross cutting issues have been properly mainstreamed.

The framework will also ensure that international and regional initiatives such as SDGs, Africa Agenda 2063, and the SADC Regional Indicative Strategic Development Plan (RISDP) are mainstreamed.

Further, the RBM&E framework will track the utilisation of financial resources allocated for programmes and projects to ensure transparency and accountability as key tenets for good governance. To ensure efficacy in the implementation of NDS1, bi-annual reviews, coupled with a Mid-Term and Terminal Evaluation will be undertaken.

Coordination of NDS1 Implementation, Monitoring and Evaluation

In making decisions on new policy directions or strategies, Cabinet will be informed by timely, accurate and valid information from the WoGPMES on the progress and implementation status of all approved national programmes and projects.

Ministers, Accounting Officers and Programme Managers will be held accountable for the delivery of outcomes and outputs identified in the Development Results Frameworks of the Strategic Performance Plans at Ministry, Programme and Activity levels.

Regular feedback to the Cabinet on the progress and performance is critical under the IRBM system. The High level NDS1 National Steering Committee will therefore;
provide periodic reports on RBM&E to the Ministerial Committee. This will be supported by the e-enabled WoGPMS which will produce periodic and on-demand performance data for informed decision making.

**Implementation Level**

905. There will be efficacy in delivering the mandated national development results. The programme or project’s results chain will show the different levels of results which consists of inputs, activities, outputs, outcomes and impacts. The MDAs are the mechanisms to deliver their respective programme outputs and outcomes which will in turn contribute to the achievement of the development results at the national, sector/sub-sector levels.

906. Harmonisation of systems and frameworks under the overarching WoGPMS is essential for effective tracking, monitoring, evaluation and reporting of programme performance results at institutional level and for enhanced accountability.

907. The M&E Department in the OPC will be key in the overall oversight of the implementation on NDS1 across Government. It will in this regard:
   (a) Provide technical guidance based on RBM&E technical guidelines;
   (b) Resolve technical issues on RBM&E,
   (c) Review policy guidelines, ministry plans, external evaluations and reports, RBM&E training curricula, RBM&E professional competency, and certification programme.
   (d) Manage the WOGPMS

908. In order to determine the level of achievement of expected results, programme performance planning, monitoring and evaluation will be continuous and carried out through the RBM&E framework. This will guarantee planned results of a
development programme and results, validate the achievements as well as contributory role of cross-cutting issues such as gender and development.

909. This will be done through the signing of Performance Contracts between the Tripartite and Permanent Secretaries or Heads of Agencies. The Tripartite consists of:

- The OPC which will be responsible for creating an enabling policy environment and the overall oversight of the NDS1;
- The PSC will ensure the relevant skills and adequate staff is deployed; and
- Treasury will ensure provision of adequate financial and material resources to implement the NDS1.

Devolution and Decentralisation

910. In view of the implementation of the Devolution Policy, lower level tiers of Government will be guided by NDRF and SDRF in the M&E of programmes and projects under the NDS1. This will ensure the measurement of their contribution to national targets from the Wards, Districts, and Provinces.

911. The Provincial and Chiefs Council will be critical in the monitoring of the NDS1 in the lower tiers of Government. Further, planning, financing and implementation capacities at Provincial and District levels will be strengthened to support the devolved functions. Figure 19 below shows NDSI Implementation, Monitoring and Evaluation Architecture.
Figure 19: NDSI Implementation, Monitoring and Evaluation Architecture

Source: Office of the President and Cabinet, 2020
Cabinet

912. Cabinet is the highest executive authority to demand the consistent provision of efficient, effective and quality public services from Government structures benefiting the citizenry at all times on a sustainable basis. In this regard, all M&E reports generated by High Level NDS1 National Steering Committee will be submitted to Cabinet for consideration and approval. Below are the terms of reference of various Committees in NDS1.

A. Terms of Reference for the National Steering Committee

1. Provide strategic policy direction during NDS1 implementation.
2. Mobilise resources for the NDS1 during implementation.
3. Convene regular meetings to assess the progress in the implementation of NDS1.
4. Monitor and evaluate the implementation of the NDS1.

B. Terms of Reference for the National Joint Review Committee

1. Coordinate the work of the NDS1 Thematic Working Groups.
2. Engage all key Stakeholders to ensure that the NDS1 is inclusive during implementation.
3. Ensure the NDS1 is consistent with strategic policy direction as outlined by the National Steering Committee.
4. Make periodic progress reports to the National Steering Committee.
5. Undertake any work as directed by the NDS1 National Steering Committee.
C. Terms of Reference for the Secretariat Tripartite Technical level

1. Assist in the organisation of the key stakeholder during implementation of NDS1.
2. Work closely with Thematic Working Group Chairs during implementation of NDS1.
3. Undertake any other work as directed by the National Steering and Joint Review Committees.
## ANNEXES

### NATIONAL DEVELOPMENT RESULTS FRAMEWORKS (NDRF) AND SECTOR DEVELOPMENT RESULTS FRAMEWORKS (SDRF)

#### ECONOMIC GROWTH AND STABILITY NATIONAL DEVELOPMENT RESULTS FRAMEWORK 2021-2025

<table>
<thead>
<tr>
<th>National Key Results Area (KRA)</th>
<th>National Outcome</th>
<th>Key Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Targets</th>
<th>Lead Player</th>
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<td>2020</td>
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<td>2022</td>
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<td>Declining General Price Level</td>
<td>Annual Average Inflation (%)</td>
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<td>23.7</td>
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<tr>
<td></td>
<td>Maintaining Sustainable Fiscal Deficit</td>
<td>Ratio of Fiscal Deficit to GDP (%)</td>
<td>-0.47</td>
<td>-1.29</td>
<td>-1.55</td>
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<tr>
<td></td>
<td>Declining Debt levels</td>
<td>Ratio of Public Debt to GDP</td>
<td>78.7</td>
<td>64.7</td>
<td>65.0</td>
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<td></td>
<td>Improving Balance of Payments</td>
<td>Ratio of Current Account Balance to GDP (%)</td>
<td>6.3</td>
<td>3.1</td>
<td>1.4</td>
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<tr>
<td></td>
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<td>Months of Import cover</td>
<td>1.0</td>
<td>2.0</td>
<td>3.5</td>
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<tr>
<td>Sustainable Economic Growth</td>
<td>Increased GDP</td>
<td>Real GDP growth (%)</td>
<td>(4.5)</td>
<td>7.4</td>
<td>5.5</td>
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<tr>
<td></td>
<td>Increased per capita Incomes</td>
<td>Per capita Income (US$)</td>
<td>1,155</td>
<td>1,835</td>
<td>2,128</td>
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<td></td>
<td>Improved ease of doing business ranking</td>
<td>Ease of Doing Business Ranking</td>
<td>140</td>
<td>120</td>
<td>100</td>
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<tr>
<td>Inclusive Economic Growth</td>
<td>Increased Decent Jobs</td>
<td>Percentage of people in Formal employment</td>
<td>24%</td>
<td>25%</td>
<td>26%</td>
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<tr>
<td></td>
<td>Improved financial inclusion</td>
<td>Percentage of financially included persons</td>
<td>77%</td>
<td>80%</td>
<td>83%</td>
</tr>
<tr>
<td>National Key Result Areas (KRA's)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDS1 Yearly Sectoral Targets</td>
</tr>
<tr>
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<tr>
<td>Economic (Fiscal)</td>
<td></td>
<td>Improved revenue collection</td>
<td>Total Revenue to GDP Ratio</td>
<td>16.3%</td>
<td>16.4%</td>
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<tr>
<td>Macro-economic Stability</td>
<td></td>
<td>Improved public expenditure management</td>
<td>Wage bill as a % of Revenue</td>
<td>40.6</td>
<td>44.2</td>
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<td></td>
<td></td>
<td>Improved Debt management</td>
<td>Debt to GDP Ratio</td>
<td>78.7</td>
<td>64.7</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Improved Development Assistance coordination</td>
<td>Level of co-ordinated Development Assistance</td>
<td>0.5 billion</td>
<td>0.6 billion</td>
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<tr>
<td></td>
<td></td>
<td>Improved Budget transparency</td>
<td>Budget Transparency Index</td>
<td>49/100</td>
<td>51/100</td>
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<tr>
<td>Economic (Monetary and Price Stability)</td>
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<td>Annual Average Inflation rate</td>
<td>6.54</td>
<td>134.8</td>
<td>23.7</td>
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<td>National Key Result Areas (KRA’s)</td>
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<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDS1 Yearly Sectoral Targets</td>
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<td>-----------------------------</td>
</tr>
<tr>
<td>Financial Sector</td>
<td></td>
<td>Improved Levels of Financial Inclusion</td>
<td>proportion of banked adults</td>
<td>69%</td>
<td>80%</td>
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<tr>
<td></td>
<td></td>
<td>Developed and sustainable microfinance sector</td>
<td>Portfolio at Risk</td>
<td>12.7%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Improved Financial stability</td>
<td>Ratio of Non-performing loans to Total loans</td>
<td>1.03%</td>
<td>&lt; 5%</td>
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<tr>
<td></td>
<td></td>
<td>Improved BOP Account</td>
<td>Current Account Balance</td>
<td>6.3</td>
<td>3.1</td>
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<tr>
<td></td>
<td></td>
<td>Sustained Growth</td>
<td>Increased growth in the Agricultural sector</td>
<td>-0.2%</td>
<td>11.3%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Increased growth in the Mining growth Rate (%)</td>
<td>-4.7%</td>
<td>11.0%</td>
<td>7.4%</td>
</tr>
</tbody>
</table>

**ECONOMIC GROWTH AND STABILITY SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025**

**CONTRIBUTING PARTNERS**

- **Public Sector**
  - Line Ministry/Central Agency (Lead): RBZ
  - Prop. Gov’t: All Provincial Governments
  - Local Auth.: All Local Councils
  - Stat. Body/Para: All
  - Private Sector: Banks
  - INGOs/NGOs: All NGOs
  - Community: All Communities
  - Dev’t Part.: IMF, World Bank, AfDB

- **Other**
  - Line Ministry/Central Agency (Lead): RBZ
  - Prop. Gov’t: All Provincial Governments
  - Local Auth.: All Local Councils
  - Stat. Body/Para: All
  - Private Sector: Banks
  - INGOs/NGOs: All NGOs
  - Community: All Communities
  - Dev’t Part.: IMF, World Bank, AfDB

**FINANCIAL SECTOR**

- Improved Levels of Financial Inclusion
- Ratio of Non-performing loans to Total loans

**DEVELOPED AND SUSTAINABLE MICROFINANCE SECTOR**

- Portfolio at Risk
- Ratio of Non-performing loans to Total loans

**IMPROVED FINANCIAL STABILITY**

- Current Account Balance
- Ratio of Non-performing loans to Total loans

**IMPROVED BOP ACCOUNT**

- Baseline Targets
- Yearly Sectoral Targets

**SUSTAINED GROWTH**

- Increased growth in the Agricultural sector
- Increased growth in the Mining growth Rate (%)
## Economic Growth and Stability Sector Development Results Framework 2021-2025

### National Key Result Areas (KRAs)

<table>
<thead>
<tr>
<th>Sector Outcome Indicator</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
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<tr>
<td><strong>Economic Growth</strong></td>
<td></td>
<td></td>
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<tr>
<td>Increased growth in the mining sector</td>
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<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Increased growth in the manufacturing sector</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Electricity growth rate (%)</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Contributing Partners

- **Public Sector**
  - Ministry of Industry and Commerce (MoIC)
  - Ministry of Energy and Power Development (MoEPD)
  - Ministry of Tourism, Industry, and Investment Development (MoTID)
  - Ministry of Local Government (MoLG)
  - Ministry of Health and Child Care (MoHCC)
  - Ministry of Defence and War Veterans Affairs (MoDWA)
  - Ministry of Higher Education, Research, Science and Technology (MoHTE)

- **Other**
  - ZIMTRADE
  - ZIDA
  - RBZ
  - ZERA
  - ZESA
  - ZPC
  - ZIMRA
  - ZINWA
  - ARDA
  - ZIMRA
  - ZERA
  - CZI
  - ZNT
  - ZIMRA

- **Private Sector**
  - Mining Federation
  - Association of Small Scale Miners
  - ZGS
  - Banking Institutions

- **NGOs/INOs**
  - SNV
  - Plan International World Vision
  - Camfed
  - Lutheran Development Services

- **Community**
  - Community Share Ownership Trusts

### Baseline Performance

- **Economic Growth**
  - Mining sector: 10.8%
  - Manufacturing sector: 6.4%

- **Electricity Growth Rate (%)**
  - 6.4%
  - 8.5%
  - 6.1%

### Key Indicators

- **Ministry of Industry and Commerce (MoIC)**
  - MoMMD
  - MoEPD
  - MoHTE
- **MoTID**
  - MoICTs
  - MoFED
  - MoYSR
- **MoLAWRR**
  - MoLAWRR
  - MoICTs
- **MoHTE**
  - MoHTE

### Targets

- **2020**
  - Mining sector: 10.8%
  - Manufacturing sector: 6.4%
- **2021**
  - Mining sector: 6.4%
  - Manufacturing sector: 6.5%
- **2022**
  - Mining sector: 8.0%
  - Manufacturing sector: 6.0%
- **2023**
  - Mining sector: 6.1%
  - Manufacturing sector: 6.1%
- **2024**
  - Mining sector: 6.0%
  - Manufacturing sector: 6.0%
- **2025**
  - Mining sector: 6.1%
  - Manufacturing sector: 6.1%
<table>
<thead>
<tr>
<th>National Key Result Areas (KRA s)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

**Increased growth in the tourism sector**
- **Tourism Growth Rate**
  - Baseline: -7.5%
  - NDS1 Targets: 5.7%, 5.6%, 5.1%, 4.5%, 4.2%

**Contribution Partners**
- MoLAWRR, MoHTE, MoLGPW, MoNHSA
- ZINWA, IDBZ, NOIC EMA, Petrotrade, RBZ, ZPC, ZETDC, ZENV, CTC, ZIDA
- Renewable Energy Association of Zimbabwe, ZIE, Local Banks, IPPs, Oil, Marketing Companies, Gas suppliers, ZFU, CCZ, ZMF

**Inclusive Growth**
- **Social Improved decent jobs**
  - Level of formal employment: 24%, 25%, 26%, 27%, 29%, 30%

**Contribution Partners**
- MoHTE, MoPSL, MoPS, MoYSAR, MoWA, MoIC, MoLTE, MoPSL, MoP, MoYSAR, MoWA, MoIC
- Provincial Councils, Local authorities, ZimCHE, SMEDCO, TNP, ZimDev, Zimnhubwe Gender Commission
- EMCOZ Trade Unions Employers' Associations, Financial Institutions, NANGO Care Plan, Human rights organisations, Women and Youth Associations, KMACO
- Disabled Persons Organisations, World Bank, IMF, ADB, AU, UN, SADC, ECA, ARLAC

**Contributing Partners**
- Public Sector
  - Line Ministry/Central Agency (Lead)
  - Prog. Gov't
  - Local Auth.
  - Stat. Body/Para
- Other
  - Private Sector
  - INGOs/L NGOs
  - Commun
  - Dev't Part.

**Other**
- WWF Environment Africa, Hivos
- UNOPS, UNIDO, IRENA
### ECONOMIC GROWTH AND STABILITY SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025

<table>
<thead>
<tr>
<th>National Key Result Areas (KRA's)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
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</thead>
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<td></td>
<td></td>
<td>2020</td>
<td>2021</td>
<td>2022</td>
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<tr>
<td>Improved financial inclusion</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>% of financially included persons</td>
<td></td>
<td></td>
<td></td>
<td>77%</td>
<td>80%</td>
<td>83%</td>
</tr>
</tbody>
</table>

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<thead>
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### Food and Nutrition Security National Development Results Framework 2021-2025

<table>
<thead>
<tr>
<th>National Priority Area</th>
<th>National Results (KRA)</th>
<th>Key Area</th>
<th>National Outcome</th>
<th>Key Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Targets</th>
<th>Lead Player</th>
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<tbody>
<tr>
<td>Food and Nutrition Security</td>
<td>Food Security</td>
<td>Improved food security</td>
<td>Proportion of food insecure people</td>
<td>59%</td>
<td>30%</td>
<td>25%</td>
<td>14%</td>
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<tr>
<td></td>
<td></td>
<td>Improved Self sufficiency</td>
<td>Percentage of maize production over total requirements</td>
<td>45%</td>
<td>60%</td>
<td>63%</td>
<td>89%</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage of milk production over total requirements</td>
<td>67%</td>
<td>68%</td>
<td>75%</td>
<td>83%</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage of beef production over total requirements</td>
<td>40%</td>
<td>50%</td>
<td>58%</td>
<td>75%</td>
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<tr>
<td></td>
<td>Increased farm incomes</td>
<td>Per capita farm income</td>
<td>US$1,440</td>
<td>US$2,000</td>
<td>US$2,626</td>
<td>US$3,200</td>
<td>US$3,740</td>
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<td>Nutrition Security</td>
<td>Improved Nutrition status</td>
<td>Proportion of households accessing safe water</td>
<td>77.1</td>
<td>77%</td>
<td>77%</td>
<td>77%</td>
<td>77%</td>
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<tr>
<td></td>
<td></td>
<td>Proportion of households accessing safe sanitation</td>
<td>68.8</td>
<td>70%</td>
<td>72%</td>
<td>73%</td>
<td>75%</td>
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<tr>
<td></td>
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<td>Proportion of children Stunted</td>
<td>23.50%</td>
<td>21%</td>
<td>20%</td>
<td>19%</td>
<td>18%</td>
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<tr>
<td></td>
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<td>Prevalence of childhood obesity</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
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<tr>
<td></td>
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<td>Prevalence of iron deficiency anaemia in women of child bearing age</td>
<td>27%</td>
<td>24%</td>
<td>21%</td>
<td>18%</td>
<td>15%</td>
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<td>Horticulture production</td>
<td>Value of Horticultural products</td>
<td>US$3.3 billion</td>
<td>US$3.4 billion</td>
<td>US$3.5 billion</td>
<td>US$3.6 billion</td>
<td>US$3.7 billion</td>
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<tr>
<td>Food Security</td>
<td>Economic (Agriculture)</td>
<td>Improved maize production</td>
<td>Quantity of maize produced (Mt)</td>
<td>907 629</td>
<td>1 800</td>
<td>000</td>
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<td>Improved wheat production</td>
<td></td>
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<td>Quantity of wheat produced (Mt)</td>
<td>94 685</td>
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<td>Improved traditional grains production</td>
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<td>Quantity of traditional grains produced (Mt)</td>
<td>152 515</td>
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<td>Improved tobacco production</td>
<td></td>
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<td>Quantity of tobacco produced (Mt)</td>
<td>154 926</td>
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<td>Improved seed cotton production</td>
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<td>Quantity of seed cotton produced (Mt)</td>
<td>101 000</td>
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<td>Improved soya beans production</td>
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<td>Quantity of soya beans produced (Mt)</td>
<td>47 088</td>
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<td>Improved sugar beans production</td>
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<td>Quantity of sugar beans produced (Mt)</td>
<td>12 650</td>
<td>30</td>
<td>000</td>
<td>50</td>
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<td>Improved groundnuts production</td>
<td></td>
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<td>Quantity of groundnuts produced (Mt)</td>
<td>87 480</td>
<td>100</td>
<td>000</td>
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<tr>
<td>National Key Result Areas (KRAs)</td>
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<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDS1 Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
<td>Other</td>
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<td></td>
<td></td>
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<td>2020</td>
<td>2021 202 2 202 3 202 4 202 5</td>
<td>Line Ministry/Counter Agency (Lead)</td>
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<td></td>
<td>Prov. Gov’t Local Auth.</td>
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<td>Stat. Body/Para Private Sector</td>
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<td></td>
<td></td>
<td></td>
<td>NGOs/Local NGOs</td>
<td>Community</td>
</tr>
<tr>
<td>Improved cowpeas production</td>
<td>Economic (Agriculture)</td>
<td>Quantity of cowpeas produced (Mt)</td>
<td>18 430</td>
<td>20 000 25 000 30 000 35 000 40 000</td>
<td>MLAWRR</td>
<td>Mash Central, East, West, Midlands, Manicaland</td>
<td>All Ministry Para</td>
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<td>Improved oranges production</td>
<td>Economic (Agriculture)</td>
<td>Quantity of oranges produced (Mt)</td>
<td>151 772</td>
<td>170 000 200 000 230 000 250 000 259 000</td>
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<td>Mash Central, East, West, Midlands, Manicaland</td>
<td>All Ministry Para</td>
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<td>Improved lemons production</td>
<td>Economic (Agriculture)</td>
<td>Quantity of lemons produced (Mt)</td>
<td>18 438</td>
<td>20 000 22 000 23 000 24 000 25 000</td>
<td>MLAWRR</td>
<td>Mash Central, East, West, Midlands, Manicaland</td>
<td>All Ministry Para</td>
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<td>Improved bananas production</td>
<td>Economic (Agriculture)</td>
<td>Quantity of bananas produced (Mt)</td>
<td>271 404</td>
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<td>Mash Central, East, West, Midlands, Manicaland</td>
<td>All Ministry Para</td>
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<td>Improved apples production</td>
<td>Economic (Agriculture)</td>
<td>Quantity of apples produced (Mt)</td>
<td>4 347</td>
<td>5 000 5 200 5 500 6 000 6 000</td>
<td>MLAWRR</td>
<td>Mash Central, East, West, Midlands, Manicaland</td>
<td>All Ministry Para</td>
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<tr>
<td>Improved peaches and nectarines production</td>
<td>Economic (Agriculture)</td>
<td>Quantity of peaches and nectarines produced (Mt)</td>
<td>8 040</td>
<td>8 200 8 500 9 000 9 600 9 975</td>
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<td>Mash Central, East, West, Midlands, Manicaland</td>
<td>All Ministry Para</td>
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<td>Improved avocado production</td>
<td>Economic (Agriculture)</td>
<td>Quantity of avocado produced (Mt)</td>
<td>84 091</td>
<td>86 000 87 000 88 000 89 000 90 000</td>
<td>MLAWRR</td>
<td>Mash Central, East, West, Midlands, Manicaland</td>
<td>All Ministry Para</td>
</tr>
<tr>
<td>Improved mango production</td>
<td>Economic (Agriculture)</td>
<td>Quantity of mango produced (Mt)</td>
<td>96 120</td>
<td>100 000 105 000 120 000 128 000 132 000</td>
<td>MLAWRR</td>
<td>Mash Central, East, West, Midlands, Manicaland</td>
<td>All Ministry Para</td>
</tr>
<tr>
<td>National Key Result Areas (KRAs)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDS1 Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
<td>Other</td>
</tr>
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<td></td>
<td></td>
<td>Public Sector</td>
<td></td>
</tr>
<tr>
<td>Improved sugarcane production</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5 600</td>
<td>5 800</td>
<td>6 000</td>
</tr>
<tr>
<td>Improved tea production</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>37 835</td>
<td>37 950</td>
<td>38 000</td>
</tr>
<tr>
<td>Improved macadamia production</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>43 064</td>
<td>45 000</td>
<td>50 000</td>
</tr>
<tr>
<td>Economic (Agriculture)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>49 115</td>
<td>60 000</td>
<td>70 000</td>
</tr>
</tbody>
</table>

**Economic (Agriculture)**

**Increased meat production and other by products**

**Quantity of beef produced (Mt)**

<table>
<thead>
<tr>
<th></th>
<th>476T</th>
<th>500</th>
<th>800</th>
<th>1 000</th>
<th>1 500</th>
<th>2 000</th>
</tr>
</thead>
</table>

**Quantity of mutton produced (Mt)**

<table>
<thead>
<tr>
<th>476T</th>
<th>500</th>
<th>800</th>
<th>1 000</th>
<th>1 500</th>
<th>2 000</th>
</tr>
</thead>
</table>

**Quantity of pork produced (Mt)**

<table>
<thead>
<tr>
<th>6 183T</th>
<th>8 000</th>
<th>10 000</th>
<th>15 000</th>
<th>16 000</th>
<th>18 000</th>
</tr>
</thead>
</table>

**Quantity of poultry produced (Mt)**

<table>
<thead>
<tr>
<th>9 660T</th>
<th>000</th>
<th>000</th>
<th>000</th>
<th>000</th>
<th>000</th>
</tr>
</thead>
</table>

**Quantity of table eggs produced (million Dozens)**

<table>
<thead>
<tr>
<th>9 660T</th>
<th>000</th>
<th>000</th>
<th>000</th>
<th>000</th>
<th>000</th>
</tr>
</thead>
</table>

**Quantity of goat meat produced (Mt)**

<table>
<thead>
<tr>
<th>4 196T</th>
<th>000</th>
<th>000</th>
<th>000</th>
<th>000</th>
<th>000</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Key Result Area (KRAs)</td>
<td>Sector</td>
<td>Performance Indicators</td>
<td>Public Sector</td>
<td>Other</td>
<td>Private Sector</td>
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</tr>
<tr>
<td>Economic (Agriculture)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improved Food Reserves</td>
<td></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Number of Farms Audited</td>
<td></td>
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<td></td>
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<tr>
<td>Number of Farms Inspected</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Number of Farms Disputes Resolved</td>
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<tr>
<td>Economic (Agriculture)</td>
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<td></td>
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<tr>
<td>Improved Land Utilisation</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Number of Farms Audited</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Number of Farms Inspected</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Number of Farms Disputes Resolved</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Contributing Partners**
- Private Sector: Other, Private traders, Value chain actors
- Other: MLAWRR, Private traders
- NGO/NGOs: ZLC, Private traders
- Community Development: Traditional leaders
- Disaster Risk Management: ZICA, Traditional leaders

**Baseline** 2020
| Quantity of Farmed Fish Produced (Mt) | 12,000 T |
| Number of Farms Audited (District) | 80 |
| Number of Farms Inspected (District) | 1,800 |
| Number of Farms Disputes Resolved (District) | 139 |

**NDS1 Yearly Sectoral Targets**
- 2020: 12,000 T, 80, 1,800, 139
- 2021: 15,000 T, 90, 200, 160
- 2022: 17,000 T, 100, 300, 200
- 2023: 18,000 T, 110, 400, 300
- 2024: 19,000 T, 120, 500, 400
- 2025: 20,000 T, 130, 600, 500
### FOOD AND NUTRITION SECURITY SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025

<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline 2020</th>
<th>NDSI Yearly Sectoral Targets 2021-2025</th>
<th>CONTRIBUTING PARTNERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Security of Tenure and greater investment in agricultural land</td>
<td></td>
<td></td>
<td>Number of Farms inspected for 99-year lease recommendations</td>
<td>31 200 200 200 200 200 200</td>
<td></td>
<td>Provincial Lands Office Registrars General’s Office</td>
</tr>
<tr>
<td>Nutrition Security Social (Nutrition )</td>
<td>Improved Access and Utilization of Nutritious Food</td>
<td></td>
<td>Number of households consuming fortified products including Bio-Fortified Crops</td>
<td>18 30 50 60 70 0.9</td>
<td>MLAWRR MoHCC MoFED MoEPD MoTPD MoM MoE MoWA MoY OPC</td>
<td>Provincial councils</td>
</tr>
<tr>
<td>Women Minimum dietary diversity score</td>
<td></td>
<td></td>
<td>43% 45 50 55 58 60</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Acceptable Diet for Children 6-59 months</td>
<td></td>
<td></td>
<td>10.70% 12 14 16 18 20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food consumption score</td>
<td></td>
<td></td>
<td>47% 50 52 55 57 60</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improved Nutrition Specific Interventions</td>
<td>Proportion of Children under five receiving Vitamin A</td>
<td></td>
<td>85% 85 85 85 85 90</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proportion of Children under five with access to treatment of acute malnutrition</td>
<td></td>
<td></td>
<td>33% 35 % 40 45 50 50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Key Result Areas (KRAs)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDS1 Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>2020</td>
<td>2021 2022 2023 2024 2025</td>
<td>Public Sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2021 2022 2023 2024 2025</td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Line Ministry/Central Agency (Lead)</td>
<td>Prov. Gov’t</td>
</tr>
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<td></td>
<td></td>
<td>Local Auth.</td>
<td>Stat. Body/Para</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Proportion of pregnant women receiving iron and folate supplementation</td>
<td>88%</td>
<td>90 90 90 90</td>
<td></td>
</tr>
<tr>
<td>Social (Nutrition)</td>
<td>Nutrition sensitive Social assistance and protection</td>
<td>Proportion of Children under 6 months who are exclusively being breast fed</td>
<td>41%</td>
<td>50 50 50 50</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nutrition Basket in place</td>
<td></td>
<td>0 1 1 1 1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# MOVING THE ECONOMY UP THE VALUE CHAIN AND STRUCTURAL TRANSFORMATION NATIONAL DEVELOPMENT RESULTS FRAMEWORK 2021-2025

<table>
<thead>
<tr>
<th>National Priority Area</th>
<th>National Key Results Area (KRA)</th>
<th>National Outcome</th>
<th>Key Performance Indicator</th>
<th>Baseline</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
<th>Lead Player</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moving the economy up the Value Chain and Structural Transformation</td>
<td>Structurally balanced economy</td>
<td>Improved value addition</td>
<td>Contribution of the secondary sector to GDP</td>
<td>11.7</td>
<td>12.1</td>
<td>12.4</td>
<td>13.6</td>
<td>14.5</td>
<td>15.0</td>
<td>Ministry of Industry and Commerce</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Improved Contribution of manufacturing to GDP</td>
<td>Manufacturing contribution to GDP (%)</td>
<td>-10.8</td>
<td>6.4</td>
<td>6.5</td>
<td>8.0</td>
<td>6.0</td>
<td>6.1</td>
<td>Ministry of Industry and Commerce</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Improved contribution of value added exports to total exports</td>
<td>Contribution of value added exports to total exports</td>
<td>16.2%</td>
<td>16.9%</td>
<td>17.7%</td>
<td>18.4%</td>
<td>19.1%</td>
<td>18.4%</td>
<td>Ministry of Industry and Commerce</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Improved earnings from beneficiated minerals</td>
<td>Value of beneficiated minerals</td>
<td>8.3 Billion</td>
<td>8.9 Billion</td>
<td>10.7 Billion</td>
<td>12.4 Billion</td>
<td>13.5 Billion</td>
<td>14.1 Billion</td>
<td>Ministry of Mines and Mining Development</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Improved Competitiveness</td>
<td>Global Competitiveness Index</td>
<td>127/140</td>
<td>120/140</td>
<td>114/140</td>
<td>110/140</td>
<td>105/140</td>
<td>100/140</td>
<td>National Competitiveness Commission/ZIDA</td>
</tr>
<tr>
<td>Nationa l Key Result Areas (KRAs)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDS1 Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
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<td>-----------------------------</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Structural transformation econo my</td>
<td>Economic (Manuf acturing)</td>
<td>Improved performance in the manufacturing sector</td>
<td>Percentage contribution of manufacturing to GDP</td>
<td>11.7 12.1</td>
<td>12.4 13.6 14.5 15.0</td>
<td>MoIC, MoMMD, Other Members of the TWG, MoEPD, MoHTE, MoLAWRR, MoWACS, MED, MoPSE, MoCTs, MoYSE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Manufactured Exports (US$ million)</td>
<td>Contribution of manufactured exports to total exports</td>
<td>%</td>
<td>727.5 839.9</td>
<td>9659 1104.0 1262.4 1337.1</td>
<td>MoIC, MoMMD, Other Members of the TWG, MoEPD, MoHTE, MoLAWRR, MoWACS, MED, MoPSE, MoCTs, MoYSE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Capacity Utilisation</td>
<td>Share of manufacturing sector investment to total investe</td>
<td>%</td>
<td>36.4% 50% 60% 70% 75% 100%</td>
<td>MoIC, MoMMD, Other Members of the TWG, MoEPD, MoHTE, MoLAWRR, MoWACS, MED, MoPSE, MoCTs, MoYSE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Manufacturing Value added (ZWL$ million)</td>
<td>Manufacturing Real Growth (%)</td>
<td>*</td>
<td>19309 197347</td>
<td>237838 244813 267855</td>
<td>MoIC, MoMMD, Other Members of the TWG, MoEPD, MoHTE, MoLAWRR, MoWACS, MED, MoPSE, MoCTs, MoYSE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Economic (Manufacturing)</td>
<td>Improved value of Agro Processed Goods</td>
<td></td>
<td>60000m t</td>
<td>70000m t</td>
<td>80000m t</td>
<td>90000m t</td>
<td>100000m t</td>
<td>110000m t</td>
<td>MoIC, MoMMD, Other Members of the TWG, MoEPD, MoHTE, MoLAWRR, MoWACS, MED, MoPSE, MoCTs, MoYSE</td>
</tr>
<tr>
<td></td>
<td>Soybean throughput</td>
<td>Crashing of soybean</td>
<td>Mt</td>
<td>50000m t</td>
<td>65000m t</td>
<td>70000m t</td>
<td>80000m t</td>
<td>90000m t</td>
<td>100000m t</td>
<td>MoIC, MoMMD, Other Members of the TWG, MoEPD, MoHTE, MoLAWRR, MoWACS, MED, MoPSE, MoCTs, MoYSE</td>
</tr>
<tr>
<td></td>
<td>Production of Phosphates</td>
<td>Production of Ammonium Nitrate</td>
<td>Mg</td>
<td>30000m t</td>
<td>50000m t</td>
<td>0mt</td>
<td>100000mt</td>
<td>150000mt</td>
<td>200000mt</td>
<td>MoIC, MoMMD, Other Members of the TWG, MoEPD, MoHTE, MoLAWRR, MoWACS, MED, MoPSE, MoCTs, MoYSE</td>
</tr>
<tr>
<td></td>
<td>Importation of Phosphates(mt)</td>
<td>Importation of A(N) (mt)</td>
<td></td>
<td>180000m t</td>
<td>175000m t</td>
<td>170000m t</td>
<td>160000m t</td>
<td>150000mt</td>
<td>1400000mt</td>
<td>MoIC, MoMMD, Other Members of the TWG, MoEPD, MoHTE, MoLAWRR, MoWACS, MED, MoPSE, MoCTs, MoYSE</td>
</tr>
</tbody>
</table>

**SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025 - MOVING THE ECONOMY UP THE VALUE CHAIN AND STRUCTURAL TRANSFORMATION**

**Line Ministry/Central Agency (Lead):**
- MoIC
- MoMMD
- Other Members of the TWG
- MoEPD
- MoHTE
- MoLAWRR
- MoWACS
- MED
- MoPSE
- MoCTs
- MoYSE

**Contributing Partners:**
- RBZ
- Zimbabwe Investment and Development Agency (ZIMTR)
- ADE
- TNF
- MDCZ
- UNDP
- CBZ
- ZIRA
- ZIFA
- NBS
- ILO
- SADC
- UNCTAD
- IMF
- AfDB
- World Bank
- UNIDO
- AFD
- SNV
- UNDP
- ILO
- ITC
- UNESCO
- COMESA
- SADC
- EU
- JICA
- USAID
- COMESA-
- EAC-SADC
- TRIPATITE
- YOUNG
- AFRICA

**Performance Areas:**
- Public Sector
- Other
- Line Ministry/Central Agency (Lead)
- Prov. Gov’t
- Local Auth.
- Stat. Body/Para
- Private Sector
- NGOs/L.NGOs
- Community
- Dev’t Part.
### SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025 - MOVING THE ECONOMY UP THE VALUE CHAIN AND STRUCTURAL TRANSFORMATION

<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDS I Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<td></td>
<td>Public Sector</td>
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<td></td>
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<td>2021</td>
<td>2022</td>
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<td>2023</td>
<td>2024</td>
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<td>2025</td>
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<td></td>
<td></td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Local manufactured fertiliser uptake (%)</strong></td>
<td>30%</td>
<td>35%</td>
<td>45%</td>
<td>50%</td>
<td>60%</td>
</tr>
<tr>
<td><strong>Cotton uptake</strong></td>
<td>9000mt</td>
<td>12000mt</td>
<td>17000mt</td>
<td>22000mt</td>
<td>25000mt</td>
</tr>
<tr>
<td><strong>Dairy herd</strong></td>
<td>10000</td>
<td>18000</td>
<td>22000</td>
<td>24000</td>
<td>28000</td>
</tr>
<tr>
<td><strong>Production of raw milk (litres)</strong></td>
<td>70000</td>
<td>80000</td>
<td>100000</td>
<td>110000</td>
<td>120000</td>
</tr>
<tr>
<td><strong>Raw milk uptake</strong></td>
<td>70000</td>
<td>80000</td>
<td>100000</td>
<td>110000</td>
<td>120000</td>
</tr>
<tr>
<td><strong>Percentage of locally produced essential medicines</strong></td>
<td>30%</td>
<td>35%</td>
<td>40%</td>
<td>50%</td>
<td>55%</td>
</tr>
<tr>
<td><strong>Proportion of companies complying fully with category A of the WHO (%)</strong></td>
<td>0</td>
<td>5</td>
<td>15</td>
<td>25</td>
<td>40</td>
</tr>
<tr>
<td><strong>Value of export earnings from beneficiated minerals (USD)</strong></td>
<td>8.3 Billion</td>
<td>8.9 Billion</td>
<td>10.7 Billion</td>
<td>12.4 Billion</td>
<td>13.5 Billion</td>
</tr>
<tr>
<td><strong>% Contribution to GDP</strong></td>
<td>59</td>
<td>40.8</td>
<td>45.2</td>
<td>48.8</td>
<td>51</td>
</tr>
<tr>
<td><strong>Number of beneficiation plants</strong></td>
<td>5</td>
<td>10</td>
<td>15</td>
<td>20</td>
<td>25</td>
</tr>
<tr>
<td><strong>Value of investments in value addition</strong></td>
<td>5</td>
<td>10</td>
<td>15</td>
<td>20</td>
<td>25</td>
</tr>
<tr>
<td><strong>Direct employment in mineral beneficiation</strong></td>
<td>77799</td>
<td>89349</td>
<td>106151</td>
<td>117951</td>
<td>127461</td>
</tr>
<tr>
<td><strong>Indirect employment in beneficiation</strong></td>
<td>388995</td>
<td>714792</td>
<td>849208</td>
<td>943608</td>
<td>943608</td>
</tr>
<tr>
<td><strong>Gold bullion deliveries to PPR</strong></td>
<td>15tonnes</td>
<td>17tonnes</td>
<td>18tonnes</td>
<td>21tonnes</td>
<td>23tonnes</td>
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</table>

**Structurally transformed economy**

<table>
<thead>
<tr>
<th>Economic (Mining)</th>
<th>Improved mineral beneficiation</th>
<th>Value of export earnings from beneficiated minerals (USD)</th>
<th>8.3 Billion</th>
<th>8.9 Billion</th>
<th>10.7 Billion</th>
<th>12.4 Billion</th>
<th>13.5 Billion</th>
<th>14.1 Billion</th>
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<tbody>
<tr>
<td><strong>% Contribution to GDP</strong></td>
<td>59</td>
<td>40.8</td>
<td>45.2</td>
<td>48.8</td>
<td>51</td>
<td>52.1</td>
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<tr>
<td><strong>Number of beneficiation plants</strong></td>
<td>5</td>
<td>10</td>
<td>15</td>
<td>20</td>
<td>25</td>
<td>30</td>
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<tr>
<td><strong>Value of investments in value addition</strong></td>
<td>5</td>
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<td>20</td>
<td>25</td>
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<tr>
<td><strong>Direct employment in mineral beneficiation</strong></td>
<td>77799</td>
<td>89349</td>
<td>106151</td>
<td>117951</td>
<td>127461</td>
<td>130299</td>
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<tr>
<td><strong>Indirect employment in beneficiation</strong></td>
<td>388995</td>
<td>714792</td>
<td>849208</td>
<td>943608</td>
<td>943608</td>
<td>1019688</td>
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<tr>
<td><strong>Gold bullion deliveries to PPR</strong></td>
<td>15tonnes</td>
<td>17tonnes</td>
<td>18tonnes</td>
<td>21tonnes</td>
<td>23tonnes</td>
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**Contributing Partners**

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<td>ZEPAR</td>
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<td>SIRDC</td>
<td>NBA</td>
<td>ZERA</td>
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<td><strong>CEO Round Table Confederation of Zimbabwe Retailers</strong></td>
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<td>ZIDA</td>
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<td><strong>High Life Foundation Save our Souls</strong></td>
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<td>SADC</td>
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<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDS1 Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
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<tr>
<td>by small scale miners</td>
<td></td>
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<tr>
<td>Gold Service Centres</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>8</td>
<td>10</td>
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<tr>
<td>Level of locally cut and polished diamonds</td>
<td>0.5%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
<td></td>
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<tr>
<td>Level of completion in establishing Base Metal Refinery</td>
<td>0%</td>
<td>5%</td>
<td>8%</td>
<td>10%</td>
<td>15%</td>
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<tr>
<td>Established chrome to ferrochrome processing facilities</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
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<tr>
<td>Number of the coal to coke processing plants</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
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<tr>
<td>Structurally transformed economy</td>
<td>Economic (Services)</td>
<td>Improved earnings from trade in goods and services to GDP</td>
<td>Value of exports in Goods and Services to GDP</td>
<td>Public Sector</td>
<td>Other</td>
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<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>US$4.5 billion</td>
<td>Line Ministry/Central Agency (Lead)</td>
<td>CTC, ZTA, ZIMRA, ZINWA, NGZ, ARDA</td>
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<tr>
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<td></td>
<td>US$4.5 billion</td>
<td>Prov. Govt.</td>
<td>CZI, ZIDA</td>
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<td>US$5.99 billion</td>
<td>Local Auth.</td>
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<td>US$7.25 billion</td>
<td>Private Sector</td>
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<td></td>
<td></td>
<td>Community</td>
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<td></td>
<td></td>
<td>Dev’t Part.</td>
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<table>
<thead>
<tr>
<th>Improved exports of services</th>
<th>Value of export earnings from services</th>
<th>Proportion of shelf space occupied by local basic products</th>
<th>80:20</th>
<th>80:20</th>
<th>80:20</th>
<th>80:20</th>
<th>80:20</th>
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### National Priority Area

<table>
<thead>
<tr>
<th>National Priority Area</th>
<th>National Key Results Area (KRA)</th>
<th>National Outcome</th>
<th>Key Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Targets</th>
<th>Lead Player</th>
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</thead>
<tbody>
<tr>
<td>Transport, Infrastructure and Utilities</td>
<td>Provision of improved Infrastructure and services</td>
<td>Improved infrastructure and access to services</td>
<td>Infrastructure Index (access to utilities and infrastructure)</td>
<td>Year 2017 Quality of overall infrastructure 115/137 World Bank</td>
<td>112/137 109/137 106/137 103/137 100/137</td>
<td>Ministry of transport and Infrastructure Development</td>
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<td></td>
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<td></td>
<td>Year 2018 Logistics Performance Index 152/160 World Bank</td>
<td>140/160 130/160 120/160 110/160 100/160</td>
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</table>
## INFRASTRUCTURE AND UTILITIES SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025

### National Key Result Areas (KRAs)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Base line</th>
<th>NDSI Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Provision of improved infrastructure and services</td>
<td>Improved Energy Supply Capacity</td>
<td>Energy Sent Out (GWh)</td>
<td>9,230</td>
<td>12,887</td>
<td>14,316</td>
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<tr>
<td></td>
<td></td>
<td>New Capacity Installed (MW)</td>
<td>2317</td>
<td>2567</td>
<td>2567</td>
<td>2917</td>
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<tr>
<td></td>
<td></td>
<td>Substation capacity restored (MVAs)</td>
<td>365</td>
<td>400</td>
<td>450</td>
<td>500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Power transmission and distribution Lines constructed (kms)</td>
<td>420</td>
<td>600</td>
<td>670</td>
<td>700</td>
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<tr>
<td></td>
<td></td>
<td>National LPG storage capacity (MTs)</td>
<td>-</td>
<td>500</td>
<td>500</td>
<td>2000</td>
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<tr>
<td></td>
<td></td>
<td>Increased National Ethanol storage (litres)</td>
<td>11.3</td>
<td>11.3</td>
<td>11.3</td>
<td>11.3</td>
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<tr>
<td></td>
<td></td>
<td>Improve national fuel retail network capacity.</td>
<td>21</td>
<td>23</td>
<td>25</td>
<td>27</td>
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<tr>
<td></td>
<td>Improved access to modern energy services.</td>
<td>Electricity access (rural, urban)</td>
<td>44</td>
<td>46</td>
<td>48</td>
<td>50</td>
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<tr>
<td></td>
<td></td>
<td>Number of households using modern energy forms</td>
<td>14.0</td>
<td>30.0</td>
<td>40,000</td>
<td>50,000</td>
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<tr>
<td></td>
<td></td>
<td>Average end user tariff.</td>
<td>2.4</td>
<td>10.42</td>
<td>10.73</td>
<td>11.05</td>
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<td>Consumption growth.</td>
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<td>5</td>
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<td>Ratio of residential versus non-residential consumption.</td>
<td>31.6</td>
<td>30.7</td>
<td>30.70</td>
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<tr>
<td></td>
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<td>Per capita electricity consumption.</td>
<td>501.7</td>
<td>713.3</td>
<td>773.8</td>
<td>856.1</td>
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<td>National Key Result Areas (KRAs)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Base line</td>
<td>NDS1 Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
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<td>National Key Result Areas (KRAs)</td>
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<td>Eco</td>
<td>Improved roads and bridge infrastructure</td>
<td>Percentage of road network conversion to meet SATCC standard</td>
<td>6%</td>
<td>7%</td>
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<td>9%</td>
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<td></td>
<td>Percentage of road network in good condition</td>
<td>12%</td>
<td>14%</td>
<td>16%</td>
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<td>Long-term national road infrastructure improvement plan developed and in place</td>
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<td>Number of VID depots Computerised (ELLT)</td>
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<td></td>
<td></td>
<td></td>
<td>Reduction in road accidents and fatalities</td>
<td>2755</td>
<td>0</td>
<td>26100</td>
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<td></td>
<td>Road Service permits issued</td>
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<td>28000</td>
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<td>National Key Result Areas (KRAs)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Base line</td>
<td>NDSI Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
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<td>2020 2021 2022 2023 2024 2025</td>
<td>EMA Petrotrad e RBZ</td>
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<td></td>
<td>No. of Institutions connected</td>
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<td></td>
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<tr>
<td></td>
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<td></td>
<td>Economic (Rail) Improved rail infrastructure</td>
<td>1700 0 0 0</td>
<td>1500 0 0 2000 0 25000 0 0</td>
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<td>Economic (Rail) Improved rail infrastructure</td>
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<td>Economic (Rail) Improved rail infrastructure</td>
<td>32 356 59</td>
<td>36 402 81 0 0 0 0 0</td>
<td>MOEPD MOTID MOFED MPowM MoMDD MLAWR MHTEIS TD MoLGP W MonHSA</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>Economic (Rail) Improved rail infrastructure</td>
<td>0.35 0.40 0.45 0.5 0.55 0.6</td>
<td>0.40 0.45 0.5 0.55 0.6</td>
<td>MOEPD MOTID MOFED MPowM MoMDD MLAWR MHTEIS TD MoLGP W MonHSA</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Economic (Rail) Improved rail infrastructure</td>
<td>2.6m 4.5m 4.8m 5.4m 6.2m 6.7m</td>
<td>2.6 4.5 4.8 5.4 6.2 6.7</td>
<td>MOEPD MOTID MOFED MPowM MoMDD MLAWR MHTEIS TD MoLGP W MonHSA</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Economic (Rail) Improved rail infrastructure</td>
<td>0.33 0.7m 0.39 0.9m 0.89 0.9m</td>
<td>0.33 0.7m 0.39 0.9m 0.89 0.9m</td>
<td>MOEPD MOTID MOFED MPowM MoMDD MLAWR MHTEIS TD MoLGP W MonHSA</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Economic (Rail) Improved rail infrastructure</td>
<td>0.86 1m 2.7m 2.8m 2.9m 3.1m 3.8m</td>
<td>0.86 1m 2.7m 2.8m 2.9m 3.1m 3.8m</td>
<td>MOEPD MOTID MOFED MPowM MoMDD MLAWR MHTEIS TD MoLGP W MonHSA</td>
</tr>
<tr>
<td>National Key Result Areas (KRAs)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Base line</td>
<td>NDSI Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
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</tr>
<tr>
<td>Eco- nom ic (Aviation)</td>
<td></td>
<td></td>
<td>Passenger and cargo</td>
<td>5.5m</td>
<td>5.5m</td>
<td>8.5mln</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>handling capacity</td>
<td>40.2ln</td>
<td>40.2mln</td>
<td>43mln</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of passengers</td>
<td>0.5m</td>
<td>0.7m</td>
<td>0.8mln</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Cargo tonnage uplifted</td>
<td>22.5mln</td>
<td>23.6mln</td>
<td>24.8mln</td>
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</tbody>
</table>
| Improved Air Services           |        |                | Number of aircrafts         | 2500     | 3000 | 33000 | 42000 | 45000 | MOEPD | MOFED
|                                 |        |                | handled                     | 0%      | 6%   | 7%    | 75%   | 85%   | 0%    | MOEFD | MOFED |
|                                 |        |                | Compliance to                | 54%     | 65%  | 70%   | 75%   | 85%   | 0%    | MOEFD | MOFED |
|                                 |        |                | ICAO Standards and           | 75%     | 75%  | 79%   | 82%   | 84%   | 0%    | MoMM | MoMM |
|                                 |        |                | recommended practices)      | 73%     | 76%  | 79%   | 82%   | 84%   | 0%    | MLAW R| MLAW R |
|                                 |        |                | World Average Safety        | 62%     | 65%  | 70%   | 75%   | 85%   | 0%    | MHTIIS| MHTIIS |
|                                 |        |                | 62%                          | 73%     | 76%  | 79%   | 82%   | 84%   | 0%    | TD    | TD |
|                                 |        |                | Security 2%                  | 73%     | 75%  | 79%   | 82%   | 84%   | 0%    | MoLGP | MoLGP |
|                                 |        |                | Number of aircrafts         | 0       | 1    | 1     | 0     | 0     | 0     | MoNHS | MoNHS |
|                                 |        |                | purchased                   | 0       | 1    | 1     | 0     | 0     | 0     | ZER   | ZER |
| Economic                        |        |                | No. of Shipping Permits     | MOEPD   | MOFED | 10 Provinces | MOEPD | MOFED | 10 Provinces | ZERA | 92 Local |
|                                 |        |                | issued                      | MHTIIS  | TD   | 90%   | 90%   | 90%   | 90%   | 90%   | 10 Provinces | ZERA |
|                                 |        |                |                             | MOEFD   | MOFED | ZERA | ZERA | ZERA | ZERA | ZERA |
|                                 |        |                |                             | MOEFD   | MOFED | ZERA | ZERA | ZERA | ZERA | ZERA |

**Econo mic (Aviation)**

- **Improved air transport infrastructure**
  - Passenger and cargo handling capacity
  - Number of passengers
  - Cargo tonnage uplifted

- **Improved Air Services**
  - Number of aircrafts handled
  - Compliance to ICAO Standards and recommended practices
  - World Average Safety 62%
  - Number of aircrafts purchased

- **Economic**
  - No. of Shipping Permits Issued
<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Base line</th>
<th>NDSI Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Maritime)</td>
<td>Maritime and services</td>
<td>Number of boats Survey certificates issued</td>
<td>200</td>
<td>200</td>
<td>230</td>
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<tr>
<td>National Priority Area</td>
<td>National Key Results Area (KRA)</td>
<td>Key Performance Indicator</td>
<td>Baseline</td>
<td>2020</td>
<td>2021</td>
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</tr>
<tr>
<td>National Outcome</td>
<td>Improved access and usage of ICTs</td>
<td>ACCESS INDICATORS</td>
<td>1. Internet subscribers per 100 inhabitants</td>
<td>59.1%</td>
<td>5% increase (62.055%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ACCESS INDICATORS</td>
<td>2. Broadband Internet subscribers per 100 inhabitants</td>
<td>59.1%</td>
<td>5% increase (62.055%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ACCESS INDICATORS</td>
<td>3. International Internet bandwidth</td>
<td>124,627Mbps</td>
<td>134,597Mbps (8% increase)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USAGE INDICATORS</td>
<td>4. Percentage of population covered by mobile telephony (mobile penetration rate)</td>
<td>13,724,522</td>
<td>14,410,748 (5% increase)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USAGE INDICATORS</td>
<td>5. Percentage of localities with public Internet access centers (PIACs) by number of inhabitants (urban/rural)</td>
<td>94.2%</td>
<td>98%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USAGE INDICATORS</td>
<td>6. Average money spent on ICTs proportional to disposable income (Revenue generated by mobile telephone networks)</td>
<td>59.1%</td>
<td>5% increase (62.055%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USAGE INDICATORS</td>
<td>7. % contribution of ICTs to GDP</td>
<td>7.1%</td>
<td>7.1%</td>
</tr>
</tbody>
</table>

**Key Players:** OPC, MICTPCS
<table>
<thead>
<tr>
<th>National Key Result Areas (KR As)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDSI Yearly Sectoral Targets</th>
<th>Contributing Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digitally enabled economy</td>
<td>Ec. eff</td>
<td></td>
<td>Percentage completion of the e-Government Enterprise Architecture and e-Government Interoperability Framework</td>
<td>10</td>
<td>25</td>
<td>35</td>
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<tr>
<td></td>
<td>IC Ts</td>
<td></td>
<td>Percentage completion of Whole-of-Govt. (WoG) Management Information System components: Executive Electronic Dashboard (EED)</td>
<td>90</td>
<td>100</td>
<td>100</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>WoGPMS</td>
<td>90</td>
<td>100</td>
<td>100</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage completion of Government Cloud Computing System based on National Data Centre (NDC)</td>
<td>30</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage completion of Government Cloud Computing System based on National Data Centre (NDC)</td>
<td>30</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage completion of National Local ICT Device Assembly Factory</td>
<td>75</td>
<td>100</td>
<td>100</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage completion of Common Digital Identity System (Public Key Infrastructure for: Digital ID, Digital signatures, Mobile ID)</td>
<td>0</td>
<td>50</td>
<td>100</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>Percentage of Govt. officials with digital ID</td>
<td>10</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage of Govt. officials with digital signature</td>
<td>10</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage of Govt. officials with official Govt. e-mails</td>
<td>10</td>
<td>100</td>
<td>100</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage of completion of Electronic Document Management System</td>
<td>0</td>
<td>100</td>
<td>100</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Number of Provinces connected to VOIP System</td>
<td>10</td>
<td>100</td>
<td>100</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage of MDAs with access to Virtual Conferencing Systems</td>
<td>10</td>
<td>100</td>
<td>100</td>
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<tr>
<td>National Key Result Area (KRs)</td>
<td>Sector</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDSI Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
<td>Other</td>
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<td></td>
<td></td>
<td></td>
<td>2020</td>
<td>2021</td>
<td>2022</td>
<td>2023</td>
</tr>
<tr>
<td>Increase ICT Usage</td>
<td></td>
<td>Level of ICT usage by Public (ICT index):</td>
<td>59.1%</td>
<td>5% increase (62.055%)</td>
<td>5% increase (65.15%)</td>
<td>5% increase (68.41%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Email</td>
<td>25%</td>
<td>5% increase (62.055%)</td>
<td>5% increase (65.15%)</td>
<td>5% increase (68.41%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mobile Electronic transactions</td>
<td>$2,078,961</td>
<td>2,390,805</td>
<td>2,629,862,335</td>
<td>2,892,748,890,061</td>
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<td></td>
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<td>Number of Smart Solutions Implemented guided by Smart Zimbabwe 2030 Master Plan</td>
<td>5</td>
<td>10</td>
<td>15</td>
<td>20</td>
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<td></td>
<td></td>
<td>ICT Development index (ICT Skills index, ICT use, ICT skills)</td>
<td>2.39</td>
<td>2.9</td>
<td>3.0</td>
<td>3.2</td>
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<tr>
<td></td>
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<td>Improving Access to ICTs</td>
<td>59%</td>
<td>5% increase (62.055%)</td>
<td>5% increase (65.15%)</td>
<td>5% increase (68.41%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- internet penetration rate</td>
<td>94.2%</td>
<td>2% increase (96.08%)</td>
<td>2% increase (98.00%)</td>
<td>2% increase (100.00%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>mobile penetration rate</td>
<td>94.2%</td>
<td>2% increase (96.08%)</td>
<td>2% increase (98.00%)</td>
<td>2% increase (100.00%)</td>
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<tr>
<td>National Key Result Area as (KR As)</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDSI Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
<td>Other</td>
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<tr>
<td>Economic (IC Ts)</td>
<td>Increase d Investments in ICTs</td>
<td>ICT induced Employment creation</td>
<td>6039</td>
<td>2% increase 5% increase 10% increase 20% increase 22% increase</td>
<td>LINE MINISTRY/ Central Agency (Lead)</td>
<td>PROV. GOV’T</td>
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<tr>
<td></td>
<td></td>
<td>number of ICT companies created</td>
<td>5</td>
<td>7</td>
<td>10</td>
<td>15</td>
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<tr>
<td></td>
<td></td>
<td>- number of innovations developed</td>
<td>5</td>
<td>7</td>
<td>10</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- percentage increase of ICT contribution to GDP</td>
<td>7.1% 1% increase 8.2% 1% increase 9.8% 1% increase 11% 1% increase 12% 1% increase</td>
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<td>Improved compliance to Regulations and policies</td>
<td>Percentage Compliance to policies and regulations</td>
<td>75%</td>
<td>77%</td>
<td>81%</td>
<td>82%</td>
<td>83%</td>
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<td>Number of policies and regulations developed</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>1</td>
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<td>Increased Consumer Satisfaction and Protection on use of ICTs</td>
<td>ICT Consumer satisfaction index</td>
<td>0.7</td>
<td>0.75</td>
<td>0.75</td>
<td>0.8</td>
<td>0.85</td>
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<td></td>
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<td>Number of complaints</td>
<td>65</td>
<td>61</td>
<td>60</td>
<td>58</td>
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<td>National Key Result Areas (KR As)</td>
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<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDSI Yearly Sectoral Targets</td>
<td>CONTRIBUING PARTNERS</td>
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<tr>
<td>ICT literacy rate</td>
<td></td>
<td></td>
<td></td>
<td>60%</td>
<td>5% increase (62.055%)</td>
<td>5% increase (65.15%)</td>
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# HOUSING DELIVERY NATIONAL DEVELOPMENT RESULTS FRAMEWORK 2021-2025

<table>
<thead>
<tr>
<th>National Priority Area</th>
<th>National Key Results Area (KRA)</th>
<th>National Outcome</th>
<th>Key Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Targets</th>
<th>Lead Player</th>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>Ministry of National Housing and Social Amenities (MoNHSA)</td>
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<td>Housing Delivery</td>
<td>Delivery of affordable and quality settlements in urban and rural areas</td>
<td>Improved access to affordable and quality housing and social amenities</td>
<td>Number of housing units delivered as a function of effective demand</td>
<td>49,670 houses built (2019)</td>
<td>20,000</td>
<td>40,000</td>
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<td></td>
<td></td>
<td></td>
<td>Percentage Households with access to safe drinking water (Urban)</td>
<td>77.3%</td>
<td>77.5%</td>
<td>77.7%</td>
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<td></td>
<td></td>
<td></td>
<td>Percentage Households with access to safe drinking water (Rural)</td>
<td>51%</td>
<td>53%</td>
<td>55%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage households with access to proper sanitation / sewerage system (Urban)</td>
<td>43%</td>
<td>45%</td>
<td>47%</td>
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<td></td>
<td></td>
<td></td>
<td>Percentage households with access to proper sanitation systems (Rural)</td>
<td>34%</td>
<td>35%</td>
<td>37%</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage change in households with access to social amenities</td>
<td>62%</td>
<td>63%</td>
<td>65%</td>
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<td>National Key Result Areas (KRAs)</td>
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<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDS1 Yearly Sectoral Targets</td>
<td>CONTRIB UI PARTS</td>
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</tr>
<tr>
<td>Delivery of affordable and quality settlements in urban and rural areas.</td>
<td>Social (Urban and Rural Housing)</td>
<td>Increased shelter for households</td>
<td>Number of housing Units Delivered</td>
<td>N/A</td>
<td>20,000</td>
<td>40,000</td>
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<td></td>
<td></td>
<td></td>
<td>Number of urban housing renewal projects implemented (suburbs)</td>
<td>N/A</td>
<td>2</td>
<td>5</td>
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<td></td>
<td></td>
<td></td>
<td>Number of homestead models developed</td>
<td>0</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
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<td></td>
<td>Number of integrated housing projects designed</td>
<td>0</td>
<td>460</td>
<td>460</td>
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<td></td>
<td></td>
<td></td>
<td>Land hectare acquired for housing development</td>
<td>N/A</td>
<td>1,000</td>
<td>2,000</td>
</tr>
<tr>
<td>National Key Result Areas (KRAs)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDSI Yearly Sectoral Targets</td>
<td>Contributing Partners</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Residential and ancillary stands created on approved layout plans</td>
<td></td>
<td>2020 2021 2022 2023 2024 2025</td>
<td>Public Sector Other</td>
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<td></td>
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<td>Number of new villagized and planned rural settlements established</td>
<td>N/A</td>
<td>8 16 32 64 124</td>
<td>Line Ministry/Central Agency (Lead) IDBZ</td>
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<td></td>
<td></td>
<td>Improving access to basic services</td>
<td>77% 79% 83% 85% 87% 90%</td>
<td>MoNHSAMoLGPWMWaCSMEDMoTIDMoICTMoE&amp;PDMoLAW&amp;RRMoHCCMoFED</td>
<td>MoNHSAMoLGPWMWaCSMEDMoTIDMoICTMoE&amp;PDMoLAW&amp;RRMoHCCMoFED</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage Households with access to safe drinking water (Urban)</td>
<td>51% 53% 55% 57% 59% 61%</td>
<td>All 10 Provinces</td>
<td>All 32 Urban Local Authorities</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage Households with access to safe drinking water (Rural)</td>
<td>43% 45% 47% 49% 51% 53%</td>
<td>All 10 Provinces</td>
<td>All 32 Urban Local Authorities</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage households with access to proper sanitation / sewerage system (Urban)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CONTRIBUTING PARTNERS:

- Public Sector
  - Line Ministry/Central Agency (Lead)
  - IDBZ

- Other
  - MoNHSAMoLGPWMWaCSMEDMoTIDMoICTMoE&PDMoLAW&RRMoHCCMoFED
  - All 10 Provinces
  - All 32 Urban Local Authorities

- Private Sector
  - INGOs/LNGOs
  - CFGZ
  - ZNCC
  - Telecoms Companies

- Community
  - World Vision
  - GAA/WH
  - Oxfam
  - FTCZ
  - Save the Children Institute of Water and Sanitation Development
  - Higher Life
  - Traditional Leaders
  - Church Leaders
  - CSOs
  - CBOs
  - Cooperatives

- Dev’t Part
  - World Vision
  - GAA/WH
  - Oxfam
  - FTCZ
  - Save the Children Institute of Water and Sanitation Development
  - Higher Life
  - Foundation
  - IMF, WB,
<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Sectoral Targets</th>
<th>Contributing Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage households with access to proper sanitation systems (Rural)</td>
<td>34%</td>
<td>35%</td>
<td>37%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Improved access to social amenities in urban and rural areas</td>
<td>62%</td>
<td>63%</td>
<td>65%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Funding availed for Housing Finance</td>
<td>$93.5 million</td>
<td>$187 million</td>
<td>$187 million</td>
</tr>
</tbody>
</table>
### HOUSING DELIVERY SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2020

<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Sectoral Targets (2020-2025)</th>
<th>CONTRIBUTING PARTNERS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>2020</td>
<td>2021</td>
<td>2022</td>
</tr>
<tr>
<td>Increased regularisation of informal settlements</td>
<td>Percentage Households with access to basic services</td>
<td>0%</td>
<td>2%</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>MNHSA, MoLGWP, MWACSMED, MoTID, MoICT, MoE&amp;PD, MoLAWC&amp;RR, MoFED, MOHCC, MOPSE, MoJLP</td>
<td>All 10 Provinces</td>
<td>All 92 Local Authorities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Ministry/LGH</td>
<td>MoLGPW</td>
<td>All 10 Provinces</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>MoTID</td>
<td>MoICT</td>
<td>All 92 Local Authorities</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>MoE&amp;PD</td>
<td>MoLAWC&amp;RR</td>
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</tr>
<tr>
<td>MoFED</td>
<td>MOHCC</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MOPSE</td>
<td>MoJLP</td>
<td></td>
<td></td>
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</tr>
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</table>

Other partners include: ZCIA, ZNCC, Telecoms Companies, Banks and Building Societies, Law Society of Zimbabwe, Relevant NGOs, Traditional Leaders, Church Leaders, CSOs, CBOs, IMF, WB, ADB, SADC, UNDP, UN-Habitat, UNICEF, UNOPS, UNW, Shelter Afrique.
<table>
<thead>
<tr>
<th>National Priority Area</th>
<th>National Key Results Area (KRA)</th>
<th>National Outcome</th>
<th>Key Performance Indicator</th>
<th>Baseline</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
<th>Lead Player</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Capital Development and Innovation</td>
<td>Innovation and Knowledge Driven Economy</td>
<td>Specialised Workforce</td>
<td>% of Critical Skilled Experts available (verified by National Critical Skills Surveys)</td>
<td>38%</td>
<td>40%</td>
<td>45%</td>
<td>47%</td>
<td>49%</td>
<td>51%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Increased Innovation for Industrialisation</td>
<td>Number of commercialised International Property Rights Issued</td>
<td>23</td>
<td>28</td>
<td>36</td>
<td>45</td>
<td>56</td>
<td>60</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Improved access and utilisation of advanced knowledge and technologies</td>
<td>Average money spend on ICTs proportional to Disposable Income(Revenue Generated by HTEIs)</td>
<td>29%</td>
<td>33%</td>
<td>36%</td>
<td>38%</td>
<td>40%</td>
<td>42%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Percentage of Institutions with public Internet access centers (PIACs) (verified HTEIs Internet penetration rate)</td>
<td>94%</td>
<td>95%</td>
<td>96%</td>
<td>97%</td>
<td>98%</td>
<td>99%</td>
<td></td>
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</tbody>
</table>

MHTEISTD MOPSE MoHCC MoLAWR MoYASC
<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Sectoral Targets</th>
<th>Contributing Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<td>2020</td>
<td>2021</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Innovation and Knowledge Driven Economy</td>
<td>Social (Education and training)</td>
<td>Improved access to quality, equitable and inclusive education</td>
<td>ECD NER</td>
<td>15.3% EMIS</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>81.2% (EMIS)</td>
<td>82%</td>
<td>83%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>58.2% (EMIS)</td>
<td>59%</td>
<td>60%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Literacy rate</td>
<td>92.4 ZIMST ATS</td>
<td>92.5</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Grade 7 Pass rate</td>
<td>49.9% ZIMSEC</td>
<td>52%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>O level pass rate</td>
<td>31.6% ZIMSEC</td>
<td>32%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>A Level Pass rate</td>
<td>85.1% ZIMSEC</td>
<td>85%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Trade Test pass rate</td>
<td>59% HEXCO</td>
<td>60%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Artisans and Technicians pass rate</td>
<td>65% HEXCO</td>
<td>64%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Trade Tests Graduates</td>
<td>4843 HEXCO</td>
<td>485</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Turnaround time for provision of goods and services</td>
<td>32%</td>
<td>35%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Public satisfaction index</td>
<td>60%</td>
<td>70%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Percentage of qualified professionals/specialists in posts</td>
<td>65%</td>
<td>70%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Retention rate</td>
<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>National Key Result Areas (KRAs)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDS1 Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
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<td></td>
<td></td>
<td>2020</td>
<td>2021 2022 2023 2024 2025</td>
<td>Public Sector Other</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2020 21 22 23 24 25</td>
<td>Line Ministry/Central Agency (Lead) Private Sector INGOs/NGOs Community Dev’t Part.</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>WHO, CHAI, UNICEF</td>
</tr>
</tbody>
</table>

**Increased uptake and application of STEM/STEAM Subjects**

- % of Reviewed Health Training manuals/modules: 15% of curriculum reviewed in 2019.
  - Baseline: 15% in 2019.
  - NDS1: 15% in 2020, 30% in 2021, 50% in 2022, 75% in 2023, 90% in 2024, 90% in 2025.
  - All Provinces' Governments.
  - Health Professions Councils.

- Number of Students taking up STEM subjects: 17% in 2019.
  - Baseline: 17% in 2019.
  - NDS1: 18% in 2020, 19% in 2021, 21% in 2022, 25% in 2023, 25% in 2024, 25% in 2025.
  - MITEISTD.
  - MOHCC.
  - WHO.

- Number of STEM teachers trained annually: 150.
  - NDS1: 300 in 2021, 300 in 2022, 300 in 2023, 300 in 2024, 450 in 2025.
  - All Provinces' Governments.
  - Universities Polytechnics Teachers Colleges Industrial Training Colleges.

- % of schools with science laboratories: 12% of primary schools currently have labs.
  - Baseline: 12% in 2019.
  - NDS1: 14% in 2020, 16% in 2021, 19% in 2022, 22% in 2023, 30% in 2024, 30% in 2025.
  - MOHCC.
  - MITEISTD.
  - WHO.

- % of Schools Surplus/Deficit: (62% skills deficit as at 2018) 38% critical skills available by 2019.
  - Baseline: 39% in 2019.
  - NDS1: 40% in 2020, 45% in 2021, 59% in 2022, 60% in 2023, 60% in 2024, 60% in 2025.
  - MOHCC.
  - MITEISTD.
  - WHO.

- % of Critical Skilled Experts available: 38%.
  - Baseline: 38% in 2019.
  - NDS1: 40% in 2020, 45% in 2021, 47% in 2022, 49% in 2023, 51% in 2024, 51% in 2025.
  - MOHCC.
  - MITEISTD.
  - WHO.

- Ranking of Universities: (Highest ranked position of the top Zimbabwean universities)
  - MoHCC.
  - MITEISTD.
  - WHO.
<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
<th>Other</th>
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<td></td>
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<td>2020</td>
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<td></td>
<td>university in Africa)</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Transition rate to specialised workforce</td>
<td>13%</td>
<td>15%</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of MBKs developed standardised and harmonised registered them on the ZNQF from Level 4 to 10 annually</td>
<td>400</td>
<td>410</td>
<td>450</td>
<td>480</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>Number of Qualification Standards, Skills Proficiency Schedules, Course Regulations reconfigured to Education 5.0 annually (ZNQF levels 4 to 8)</td>
<td>34</td>
<td>36</td>
<td>45</td>
<td>47</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of HEXCO Artisans and Technicians</td>
<td>56028</td>
<td>56100</td>
<td>56200</td>
<td>56564</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of TVET Compliance inspections undertaken annually</td>
<td>479</td>
<td>481</td>
<td>498</td>
<td>523</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>% of post O’level graduates undergoing tertiary education trade tests</td>
<td>30%</td>
<td>31%</td>
<td>32%</td>
<td>36%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of new trades designated</td>
<td>20</td>
<td>22</td>
<td>25</td>
<td>35</td>
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<tr>
<td>National Key Result Areas (KRAs)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDS1 Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
<td>Line Ministry/Central Agency (Lead)</td>
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</tr>
<tr>
<td>Economic Innovation, Science and Technology Development</td>
<td>Improved Research Development &amp; Innovation throughput</td>
<td>Number of goods and services derived from local research and technological advancement</td>
<td>23</td>
<td>28</td>
<td>36</td>
<td>45</td>
<td>56</td>
</tr>
<tr>
<td></td>
<td>% increase in crop and livestock production with new genetics</td>
<td>25%</td>
<td>35%</td>
<td>45%</td>
<td>55%</td>
<td>65%</td>
<td>75%</td>
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<tr>
<td></td>
<td>% increase in Creative Arts and Sporting profession through Research and Development</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Percentage of health specialists available locally</td>
<td>5%</td>
<td>7%</td>
<td>9%</td>
<td>11%</td>
<td>17%</td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>Percentage of Paramedic programmes on offer</td>
<td>10%</td>
<td>15%</td>
<td>25%</td>
<td>35%</td>
<td>40%</td>
<td>45%</td>
</tr>
<tr>
<td></td>
<td>% of Engineering specialists programmes supported or trained locally</td>
<td>6%</td>
<td>8%</td>
<td>10%</td>
<td>15%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>Percentage of Agriculture specialists programmes supported or trained locally</td>
<td>20%</td>
<td>22%</td>
<td>28%</td>
<td>38%</td>
<td>48%</td>
<td>58%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>All Provinces</td>
<td>Urba n and Rural Distri ct Councils</td>
<td>RBZ</td>
<td>ZIDA</td>
<td>ZI PAR U</td>
<td>SIRDC</td>
</tr>
</tbody>
</table>

<p>| Note: | | | | | | | | | | | | | | | | | | | |</p>
<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
<th>Other</th>
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<tr>
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<td>Yearly Sectoral Targets</td>
<td></td>
<td>Line Ministry/Central Agency (Lead)</td>
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<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Number of predictive models</td>
<td>1</td>
<td>2</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>developed for civil protection (verified by the ICT Development Index)</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
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<td>Improved innovation ecosystems</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>% of programmes with digital skills mainstreamed under ZIMCHE, HEXCO, ZIMSEC and Public Service Academy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
<td>% of youths gainfully employed in the digital workspace</td>
<td>5%</td>
<td>6%</td>
<td>7%</td>
<td>10%</td>
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<tr>
<td></td>
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<td>Online Service Index</td>
<td>0.5235</td>
<td>0.6</td>
<td>0.75</td>
<td>0.85</td>
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<td>Products and services derived from predictive modelling e-applications</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td></td>
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<td>Number of Hi-Tech industries established</td>
<td>1</td>
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## Health and Wellbeing

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<tr>
<th>National Priority Area</th>
<th>National Key Results Area (KRA)</th>
<th>National Outcome</th>
<th>Key Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Targets</th>
<th>Lead Player</th>
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<tbody>
<tr>
<td>Health and Wellbeing</td>
<td>Public Health and Wellbeing</td>
<td>Improved quality of life (disaggregated)</td>
<td>Life expectancy at birth (disaggregated)</td>
<td>61yrs (M)</td>
<td>61.5yrs (M)</td>
<td>MoHCC</td>
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<td></td>
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<td></td>
<td>Maternal Mortality Ratio (deaths per 100,000)</td>
<td>425</td>
<td>388</td>
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<td></td>
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<td>Under 5 Mortality</td>
<td>61</td>
<td>57</td>
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<td></td>
<td></td>
<td></td>
<td>Overall Vacancy rate</td>
<td>15%</td>
<td>14.1%</td>
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<td></td>
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<td>AIDS Mortality per 100,000</td>
<td>147.5</td>
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<td>TB Mortality rate</td>
<td>32</td>
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<td>Cholera case fatality</td>
<td>&lt;0.5</td>
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<td>Non-Communicable Diseases (NCDs) Mortality Rate (Cervical Cancers)</td>
<td>&gt;15%</td>
<td>13.5%</td>
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<td>Malaria Mortality Rate</td>
<td>1.9</td>
<td>1.34</td>
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<td></td>
<td></td>
<td>% of availability of selected tracer medicines (Vital, Essential and Necessary (VEN))</td>
<td>51%</td>
<td>55%</td>
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<td></td>
<td></td>
<td></td>
<td>Public Health Expenditure Per Capita</td>
<td>US$30.29</td>
<td>US$35</td>
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<td></td>
<td></td>
<td></td>
<td>% Availability of functional equipment</td>
<td>40%</td>
<td>44%</td>
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<td></td>
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<td>Sanitation Coverage</td>
<td>67%</td>
<td>69%</td>
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<td></td>
<td></td>
<td></td>
<td>Portable Water Supply Coverage</td>
<td>77%</td>
<td>79%</td>
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<td></td>
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<td></td>
<td>Service availability index</td>
<td>42%</td>
<td>50%</td>
<td></td>
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<td></td>
<td></td>
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<td>Client Satisfaction index</td>
<td>75%</td>
<td>76%</td>
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</table>
## HEALTH AND WELL-BEING - SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025

### National Key Result Areas (KRAs)
- Public Health and well-being
  - Social Health (Health)
- Public Health and well-being
  - Improved human resource performance in the health sector
- Public Health and well-being
  - Improved access to availability of essential medicines
- Public Health and well-being
  - Increased access to water, sanitation and healthy environment

### Sector Performance Indicator
- Increased Domestic Funding for Health
- Overall Vacancy rate
- % of availability of selected tracer medicines
- Proportion of population using safely managed drinking water services

<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDSI YearlySectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
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</thead>
<tbody>
<tr>
<td>Public Health and well-being</td>
<td>Social Health (Health)</td>
<td>Increased Domestic Funding for Health</td>
<td>Total Gov Health Expenditure (Million USD)</td>
<td>$30.29</td>
<td>$35</td>
<td>$46</td>
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<tr>
<td>Public Health and well-being</td>
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<td>Improved human resource performance in the health sector</td>
<td>Overall Vacancy rate</td>
<td>15%</td>
<td>14.1 %</td>
<td>12%</td>
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<tr>
<td>Public Health and well-being</td>
<td></td>
<td>Improved access to availability of essential medicines</td>
<td>% of availability of selected tracer medicines (VEN)</td>
<td>51%</td>
<td>55%</td>
<td>62%</td>
</tr>
<tr>
<td>Public Health and well-being</td>
<td></td>
<td>Increased access to water, sanitation and healthy environment</td>
<td>Proportion of population using safely managed drinking water services (6.1.1)</td>
<td>77%</td>
<td>79%</td>
<td>83%</td>
</tr>
</tbody>
</table>

### Sector Outcome
- Total Gvt Health Expenditure
- Human Resources for Health (HRH) Competence (# of MDLs)
- Proportion of population using safely managed drinking water services

### Sector Performance
- Baseline
- 2020
- 2021
- 2022
- 2023
- 2024
- 2025

### Contributing Partners
- Line Ministry/Central Agency (Lead)
- Prov. Gov’t
- Local Auth.
- Stat. Body/Para
- Private Sector
- INGOs/LNGOs
- Community
- Dev’t Part.
## HEALTH AND WELL-BEING - SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025

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</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Health and well-being</strong></td>
<td></td>
<td>Improved infrastructure facilities and critical equipment for Health Service Delivery</td>
<td>% of Health facilities with functional equipment</td>
<td>40%</td>
<td>44% 51% 60% 66% 70%</td>
<td>MoHCC, MoDWV</td>
<td>Metropolitan and Provincial Councils</td>
<td>Urban and Rural Local Authorities</td>
<td>ZESA</td>
<td>Private Companies and individuals</td>
<td>NGOs e.g. World Vision, Local Level Development Structure (Community Based Maintenance)</td>
<td>European Union, GF, UN Family</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>% of newly established or renovated Health Facilities</td>
<td></td>
<td>10</td>
<td>15 25 30 42 50</td>
<td>MoHCC, MoPLW, MoFED</td>
<td>DDF</td>
<td></td>
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<td>ZIMFUND</td>
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<td></td>
<td></td>
<td>Improved enabling environment for health services delivery</td>
<td>Proportion of audit reports with adverse observations</td>
<td>0</td>
<td>0 0 0 0</td>
<td>MoHCC &amp; MoFED</td>
<td>Local authorities</td>
<td>Auditor General</td>
<td></td>
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<td>OAG-GF</td>
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<td></td>
<td></td>
<td>Reduced morbidity and mortality due to communicable and Non-Communicable diseases</td>
<td>Malaria incidence rate per 1000 persons per year (Elimination settings)</td>
<td>0.56</td>
<td>0.18 0.10 0.05 0.03 0.01</td>
<td>MOHCC</td>
<td>Local authorities</td>
<td>Napharm</td>
<td>Private Hospitals</td>
<td>USG, GF, PMI, PLAN, WHO</td>
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</table>
## HEALTH AND WELL-BEING - SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025

<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDSI Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Reproductive, maternal, new-born, child and adolescent health and Nutrition</td>
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</tbody>
</table>

### Notable Diseases
- **TB incidence** (per 1000 population)
  - Baseline: 2.04
  - **Contributing Partners:** MoHCC, National Aids Council, Napth arm

### HIV incidence (per 1000 uninfected population)
- Baseline: 2.04
- 2020: 1.23, 2021: 1.07, 2022: 0.94, 2023: 0.76, 2024: 0.57
- **Contributing Partners:** MoHCC, National Aids Council, Napth arm

### Bilharzias incidence
- Baseline: 297
- **Contributing Partners:** MoHCC, Local authorities

### Incidence of Hypertension (per 100 000)
- Baseline: 232
- **Contributing Partners:** MoHCC, Local authorities

### Incidence of Diabetes (per 100 000)
- Baseline: 59
- **Contributing Partners:** MoHCC, Local authorities

### Cervical Cancer
- Baseline: 25
- **Contributing Partners:** MoHCC, Local authorities

### Perinatal mortality rate
- Baseline: 102
- **Contributing Partners:** MoHCC, Local authorities

### Modern Contraceptive
- Baseline: 67%
- **Contributing Partners:** MoHCC, Local authorities, ZNPF, Private Hospitals, CWGH, ZACH, CBOs

**Notes:**
- **Contributing Partners** include a mix of government agencies, non-governmental organizations, and international bodies.
- **Other** partners and organizations are listed as indicated.
<table>
<thead>
<tr>
<th>National Key Result Areas (KRAs)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDSI Yearly Sectoral Targets</th>
<th>Contributing Partners</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2020</td>
<td>2021 2022 2023 2024 2025</td>
<td>Public Sector Other</td>
</tr>
<tr>
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<td></td>
<td></td>
<td>MoHCC Local authorities CWGH, ZACH CBOs WHO, UNICEF</td>
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<tr>
<td>Improved public health surveillance and disaster preparedness and response</td>
<td></td>
<td></td>
<td></td>
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<td>MoHCC Local authorities CWGH, ZACH CBOs WHO, UNICEF</td>
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<td></td>
<td>MoHCC Local authorities CWGH, ZACH CBOs WHO, UNICEF</td>
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<td>MoHCC Local authorities CWGH, ZACH CBOs WHO, UNICEF</td>
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<td></td>
<td></td>
<td>MoHCC Local authorities CWGH, ZACH CBOs WHO, UNICEF</td>
</tr>
</tbody>
</table>

1. Percentage of outbreaks detected within 48 hours in line with IDSR guidelines: 90% 100% 100% 100% 100% | MoHCC

2. Percentage of outbreaks controlled within 2 weeks in line with IDSR guidelines: 43% 60% 70% 75% 86% 93% | MoHCC

3. Service availability index: 42% 50% 57% 62% 68% 70% | MoHCC

4. Client Satisfaction Index: 75% 76% 77% 78% 79% 80% | MoHCC
<table>
<thead>
<tr>
<th>National Priority Area</th>
<th>National Key Results Area (KRA)</th>
<th>National Outcome</th>
<th>Key Performance Indicator</th>
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<th>NDS1 Yearly Targets</th>
<th>Lead Player</th>
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<tbody>
<tr>
<td></td>
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<td></td>
<td>Country Brand Ranking Global Travel and Tourism</td>
<td>120/189 116/189 112/189 108/189 104/189 100/189</td>
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<td>Competitiveness Ranking</td>
<td>114/140 113/140 112/140 111/140 110/140 109/140</td>
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<td>Global Happiness index</td>
<td>146/191 136/191 126/191 119/191 110/191 100/191</td>
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<td>International engagement and re-engagement</td>
<td>Improved international relations</td>
<td>Country Risk Index</td>
<td>Grade CCC High Risk</td>
<td>Grade CC Medium Risk</td>
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<td>Good Country Index</td>
<td>100/153 96/153 96/153 96/153 92/153 90/153</td>
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<td>Removal of sanctions</td>
<td>30% 100% 100% 100% 100% 100%</td>
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## National Key Result Areas (KRAs)

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<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDS1 Yearly Sectoral Targets</th>
<th>Line Ministry/Central Agency (Lead)</th>
<th>Contributing Partners</th>
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<td>National Key Result Areas (KRAs)</td>
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<td>Sector Outcome</td>
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<td>2020</td>
<td>2021 2022 2023 2024 2025</td>
<td>Public Sector</td>
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<td>Internatio nal engagement and re-engagement</td>
<td>Economic</td>
<td>Improved international relations</td>
<td>Volume of Trade Access to international financing (concessional financing) Number of countries in political solidarity with Zimbabwe Level of technical and financial assistance</td>
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<td>Ministers of States for Provincial Affairs</td>
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<tr>
<td>Economic</td>
<td>Improved diaspora participation in national development</td>
<td>Diaspora remittances as Percentage of GDP</td>
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<td>7%</td>
<td>8% 9% 10% 11% 12%</td>
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<td>Ministers of States for Provincial Affairs</td>
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<td>Devolution and Decentralisation Level</td>
<td>20%</td>
<td>30% 40% 50% 60% 80%</td>
<td>Ministry of Local Government &amp; Public Works</td>
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<tr>
<td>Devolution</td>
<td>Equitable regional development</td>
<td>Improved inclusive Governance and Socio-Economic Development</td>
<td>Devolution and Decentralisation Level</td>
<td>20%</td>
<td>30% 40% 50% 60% 80%</td>
<td>Ministry of Local Government &amp; Public Works</td>
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<tr>
<td>National Key Result Areas (KRAs)</td>
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<td>CONTRIBUTING PARTNERS</td>
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<tr>
<td>Equitable regional development</td>
<td>Economic</td>
<td>Improved funding of devolution and decentralisation agenda</td>
<td>% allocation from the National Budget</td>
<td>5%</td>
<td>At Least 5%</td>
<td>MoLGPW, MoFED, OPC, All other MDAs</td>
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<tr>
<td></td>
<td>Administration (Public Administration)</td>
<td>Improved Administrative Decentralisation</td>
<td>Number of services decentralised to provinces</td>
<td>-</td>
<td>3 7 10 15 20</td>
<td>MoLGPW, OPC, All other MDAs</td>
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<tr>
<td>National Priority Area</td>
<td>National Key Result Areas (KRA)</td>
<td>National Outcome</td>
<td>Key Performance Indicator</td>
<td>Base line</td>
<td>2020</td>
<td>2021</td>
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<tr>
<td>Youth, Sport and Culture</td>
<td>Youth, Sport and Culture promotion and development</td>
<td>Increased youth participation in development and decision making processes</td>
<td>Proportion of youth involved in decision making and development processes (%)</td>
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<td>Number of youth trained in vocational and entrepreneurial skills annually</td>
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<td>18 500</td>
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<td>Number of youth who accessed empowerment opportunities in all sectors of the economy</td>
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<td>Amount of Revenue generated from the consumption of cultural products and services (USD Millions)</td>
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<td>Proportion of CCIs practitioners involved in the protection of intellectual property and copyrights out of 10</td>
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<td>Percentage of government and foreign missions buildings adorned (%)</td>
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<td>Increased levels of participation in sport and recreation activities</td>
<td>Percentage increase in number of participants in sport and recreation programs and activities (%)</td>
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<td>Number of standard sport and recreation facilities constructed/refurbished per annum</td>
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<td>Amount of revenue generated through sport and recreation per annum USD million</td>
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<td>Number of sport and recreational events participated in or hosted (national, regional and international)</td>
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<td>Increase in consumption of local sport and recreation goods and services (%)</td>
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<td>Increased social cohesion, sense of national identity and pride</td>
<td>Percentage increase in level of local consumption of cultural, sport and recreation products and services (%)</td>
<td>15</td>
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<td>Number of youth involved in voluntary community and National Development</td>
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<td>20 000</td>
<td>25 000</td>
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<td>Youth, Sport and Culture promotion and development</td>
<td>Social (Youth)</td>
<td>Increased youth participation in Leadership development programmes</td>
<td>Proportion of youth involved in decision making and development processes (%)</td>
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<td>Improved Vocational skills and entrepreneurship among the youth</td>
<td>Number of youth trained in vocational and entrepreneurial skills annually</td>
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<td>Increased access to empowerment opportunities for youth</td>
<td>Number of youth who accessed empowerment opportunities in all sectors of the economy</td>
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<td>Social (Culture)</td>
<td>Improved and coordinated development of infrastructure, frameworks, products and services in arts, culture, and heritage</td>
<td>Number of cultural and heritage centres</td>
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<td>Number of active marketing platforms</td>
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### National Key Result Areas (KRAs)

<table>
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<tr>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDSI Yearly Sectoral Targets</th>
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<tr>
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#### CONTRIBUTING PARTNERS

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<td>Local Auth.</td>
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- **(CDIS) survey reports**
  
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<th>2022</th>
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<td>Proportion of locals participating in cultural activities out of 10</td>
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- **Number of ratified national and international standards and protocols dealing with culture and heritage per annum**
  
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- **Proportion of CCIs practitioners involved in the protection of intellectual property and copyrights out of 10**
  
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<th>2020</th>
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- **Percentage increase of CCIs practitioners trained & capacity built (%)**
  
<table>
<thead>
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<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
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</table>

- **Percentage of government and foreign missions buildings adorned (%)**
  
<table>
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<th>2021</th>
<th>2022</th>
<th>2023</th>
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#### Social (Sport and Recreation)

- **Improved sport performance**
  
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<tr>
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<th>2021</th>
<th>2022</th>
<th>2023</th>
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## YOUTH, SPORT AND CULTURE SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025

### National Key Result Areas (KRAs)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>programs and activities (%)</td>
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<table>
<thead>
<tr>
<th>Baseline</th>
<th>NDS1 Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
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</tr>
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<tbody>
<tr>
<td></td>
<td>2020 2021 2022 2023 2024 2025</td>
<td>Ministry of Youth, Sport, Arts and culture</td>
<td>Ministry of State Line Ministries at Province</td>
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<tr>
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<td>Boxing and Wrestling Control Board (ZNBWCB)</td>
<td>Zimbabwe Olympic Committee (ZOC)</td>
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<td>Provincal Level</td>
<td>Other Corporates</td>
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<td>Public Sector</td>
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<td>Sector Performance Indicator</td>
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<tr>
<td>Increased social cohesion, sense of national identity and pride</td>
<td>Percentage increase in level of local consumption of cultural, sport and recreation products and services (%)</td>
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<td>Number of youth involved in voluntary community and National Development</td>
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<td>Key Area</td>
<td>National Outcome</td>
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<td>Social Protection</td>
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<td>Improved access to inclusive social protection</td>
<td>Percentage of population covered by social protection systems:</td>
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### SOCIAL PROTECTION SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025

<table>
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<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
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<th>NDS1 Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Quality and affordable social protection for all</td>
<td>Social (Social assistance)</td>
<td>Reduced extreme poverty. % of people below the food poverty line</td>
<td>65% 50% 40% 30% 20% 10%</td>
<td>MoPSLSW MoLGPW MLAWRR MWACSM EmHHC DDF MoPSE MoHACH MoIC MoFED MoHITESITD MoDWV</td>
<td>Line Ministry/Central Agency (Lead) Prov. Gov’t Local Auth. Stat. Bods/Para Private Sector INGOs/LNG Os Community Dev’t Part.</td>
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<td></td>
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<td>2020 2021 2022 2023 2024 2025</td>
<td>Provinces Local Governments Grain Marketing Board Private Sector Companies</td>
<td>Local and International Non-Government Agencies Local leadership; Community Level Committee s</td>
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<tr>
<td></td>
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<td></td>
<td>% of people receiving social assistance across all interventions</td>
<td>MoPSLSW MoLGPW MLAWRR MWACSM EmHHC DDF MoPSE MoHACH MoIC MoFED MoHITESITD</td>
<td>Provinces Local Governments Grain Marketing Board Private Sector Companies</td>
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<td>MoPSLSW; MLGPW; MLAWRR; MWACSME; MoDWV</td>
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<tr>
<td><strong>Social (Social Care and Support)</strong></td>
<td>Improved care and protection of vulnerable groups</td>
<td>% of people receiving care and protection within set standards</td>
<td>15% 30% 40% 50% 60% 75%</td>
<td>MLGPW MLAWRR MWACSME DDF MoHCC MoJLPA MoHACH MoWAGCD ZGC MoPSE MoHACH MoDWV</td>
<td>Provinc ial Govt Local Authorities National Social Security Authority</td>
<td>Pvt Sector Companies Local and International Non-Government Agencies Community Leadership Committees Community Level Committees</td>
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<td>Proportion of the population that are subjected to all forms of abuse (disaggregated)</td>
<td>35% 30% 25% 20% 15% 10%</td>
<td>Provinc ial Govt Local Authorities National Social Security Authority</td>
<td>Pvt Sector Companies Local and International Non-Government Agencies Community Leadership Committees Community Level Committees</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Proportion of victims of violence who reported their victimisation to responsible authorities</td>
<td>5% 10% 12% 20% 25% 30%</td>
<td>Provinc ial Govt Local Authorities National Social Security Authority</td>
<td>Pvt Sector Companies Local and International Non-Government Agencies Community Leadership Committees Community Level Committees</td>
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<tr>
<td><strong>Social (Livelihood Support)</strong></td>
<td>Improved Livelihoods for the poor and vulnerable</td>
<td>Percentage of people with improved Resilience (absorptive, adaptive, transformative)</td>
<td>2% 3% 5% 6% 8% 10%</td>
<td>MoPSLSW MLGPW; MLAWRR; MWACSME MoDWV</td>
<td>Provinc ial Government Provincial Government Local Authorities</td>
<td>Local Leadership CCWs Community Level Committees Community Leadership Committees</td>
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<tr>
<td></td>
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<td></td>
<td>% of Households supported with</td>
<td>5% 8% 12% 15% 20% 25%</td>
<td>Provinc ial Government Provincial Government Local Authorities</td>
<td>Local Leadership CCWs Community Level Committees Community Leadership Committees</td>
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<tr>
<td>National Key Result Areas (KRAs)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDSI Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
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<td>Social Protection Sector Development Results Framework 2021-2025</td>
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<td>Livelihood Initiatives</td>
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<tr>
<td>% of Households with improved source of Livelihoods</td>
<td></td>
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<td></td>
<td></td>
<td>2%</td>
<td>5%</td>
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<tr>
<td>Social (Social Insurance)</td>
<td></td>
<td></td>
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<td></td>
<td>0</td>
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<td>Enhanced job and income security.</td>
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<td>Proportion of Retrenches with improved sources of livelihoods</td>
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CONTRIBUTING PARTNERS:
- Public Sector:
  - Line Ministry/Central Agency (Lead)
  - Prov. Gov’t
  - Local Auth.
  - Stat. Body/Para
- Other:
  - Private Sector
  - INGOs/LNGOs
  - Community
  - Dev’t Part.
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<th>National Key Result Areas (KRAs)</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
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<th>CONTRIBUTING PARTNERS</th>
<th>Other</th>
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<td>2021</td>
<td>2022</td>
<td>2023</td>
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<td>Proportion of the informal sector workers covered by social insurance</td>
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<td>Proportion of the formally employed workers covered by the unemployment benefit scheme</td>
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<td>0%</td>
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**Contributing Partners**
- **Public Sector**
  - Line Ministry/Central Agency (Lead)
  - Prov. Gov’t
  - Local Auth.
  - Stat. Body/Para
- **Other**
  - Private Sector
  - INGOs/LNGOs
  - Community
  - Dev’t Part.
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<th>National Results Area (KRA)</th>
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<th>Key Performance Indicator</th>
<th>Baseline</th>
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<td>Environmental protection, climate resilience and natural resources management</td>
<td>Environment and Climate Protection</td>
<td>Environment protected</td>
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<td>751100</td>
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<td>Area burnt (ha)</td>
<td>1100000</td>
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<td>Number of landfills established</td>
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<td>Level of penetration of early warnings systems (%)</td>
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<td>5</td>
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<td>Number of districts integrating climate change in development planning frameworks</td>
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<td>levels of GHGs emissions (MtCO2eq)</td>
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<td>36</td>
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<td>Mined area rehabilitated (Ha)</td>
<td>2 500</td>
<td>4000</td>
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<td>Area of land under protection (Million Ha)</td>
<td>24</td>
<td>25.2</td>
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<td>Number of recycling initiatives</td>
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<td>43</td>
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<td>Sustainable Natural Resources Utilisation</td>
<td>Improved Biodiversity</td>
<td>Planted Area (Ha)</td>
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<td>25 000</td>
<td>30 000</td>
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<td>National Forest cover (%)</td>
<td>44.5%</td>
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<td>Number of keystone species</td>
<td>Elephant 83 000</td>
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<td>Rhino 850</td>
<td>880</td>
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<td>1980</td>
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<td>Improved Community Livelihood</td>
<td>Net CAMPFIRE revenue for communities (US$ Millions per year)</td>
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<td>Sustainable Tourism Development</td>
<td>Increased contribution to the economy/GDP</td>
<td>Contribution to GDP (US$) Billions</td>
<td>1.1</td>
<td>1.5</td>
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<td>Sector Performance Indicator</td>
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<td>NDS1 Yearly Sectoral Targets</td>
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<td>Dev't Part.</td>
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<td>Economic (Environment)</td>
<td>Improve Ecosystem health</td>
<td>Area of wetlands restored and protected (Ha)</td>
<td>701 10 00</td>
<td>751 11 00</td>
<td>MoECTHR, MLAWRR, MoLGWP, MoLMMD, MoLPWA, MoIC, MoICT, MoMIP, MoWASME</td>
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<tr>
<td></td>
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<td>Area burnt (Ha)</td>
<td>1000 00</td>
<td>1 0000 00</td>
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<td>Number of recycling initiatives</td>
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<td>Number of landfills established</td>
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<td>Mining area rehabilitated (Ha)</td>
<td>2 500</td>
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<td>Economic (Climate)</td>
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<td>Level of penetration of early warnings systems (%)</td>
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<td>Levels of GHG emissions (MtCO2eq)</td>
<td>36.6</td>
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<td>National Key Result Areas (KRAs)</td>
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<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
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<td>NDS1 Yearly Sectoral Targets</td>
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<td>Economic (Forestry)</td>
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<td>levels of GHGs emissions (MtCO2eq)</td>
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<td>Sustainably Natural Resource Utilization</td>
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<td>Area planted (Ha)</td>
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<td>140 000 170 00 2050 00 2450 00 29000 0</td>
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<td>Area under indigenous forests (Million Ha)</td>
<td>9.9</td>
<td>10 10.1 10.2 10.3 10.4</td>
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<td>Volume of timber sustainably produced (m3)</td>
<td>265 15 6</td>
<td>2850 00 2950 00 3050 00 3150 00 32500 0</td>
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<td>Area of Timber plantations planted (Ha)</td>
<td>68848</td>
<td>7884 8 8884 8 9884 8 10884 8 11884 8</td>
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<td>Value of processed timber (Million US$)</td>
<td>54.1</td>
<td>60 70 80 90 100</td>
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<td>Improve d status of Protected Areas</td>
<td>Increase in area under protection (%)</td>
<td>5mill Ha 1.4% 1.2% 1.1% 1% 0.5%</td>
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<td></td>
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<td>Value of investment in</td>
<td>12</td>
<td>14 16 18 20 20</td>
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<tr>
<td>Sustainabili e Tourism developm ent</td>
<td>Economic (Tourism)</td>
<td>Improve d tourism growth</td>
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<td>Amount of Tourism receipts (US$) billions</td>
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<td>Employme nt contributio n (thousands )</td>
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<td>Average Room Occupancy (%)</td>
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<td>Public Service Delivery</td>
<td>Enhanced service delivery</td>
<td>Citizen satisfaction Index</td>
<td>2017 60%</td>
<td>2021 50% 2022 55% 2023 65% 2024 70% 2025 75%</td>
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<td>Social Cohesion and Reconciliation Index</td>
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</tbody>
</table>
## GOVERNANCE SECTOR DEVELOPMENT RESULTS FRAMEWORK 2021-2025

### National Key Result Areas (KRA)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDSI Yearly Sectoral Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>2020</td>
<td>2021</td>
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### CONTRIBUTING PARTNERS

<table>
<thead>
<tr>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
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<tbody>
<tr>
<td></td>
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<td>2020</td>
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</table>

### Line Ministry/Central Agency (Lead)

<table>
<thead>
<tr>
<th>Institution</th>
<th>Lead Sector</th>
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### Prov. Gov't

<table>
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### Local Aut. |

<table>
<thead>
<tr>
<th>Institution</th>
<th>Lead Sector</th>
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<tbody>
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### Private Sector

<table>
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<tr>
<th>Private Sector</th>
<th>INGOs/LNGOs</th>
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### Comm. Part. |

<table>
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<th>Partners</th>
<th>Lead Sector</th>
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### Dev't Partners

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<th>Lead Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>

### Improved rule of law

- **Ranking on Rule of Law Index (RLI)**
  - **MoJLPA**
  - **NPA**
  - **ZRP**
  - **ZACC**
  - **ZHRC**
  - **MoHAC**
  - **OPC**
  - **MoDWV**
  - **MoFED**
  - **MoPLSW**
  - **Parliament**

### Improved access to justice

- **Clearance rate of court cases**
  - **MoJLPA**
  - **NPA**
  - **ZRP**
  - **ZACC**

### Partners

- Partners
  - **UND P**
  - **WLP**
  - **World Bank**
  - **EU**
  - **AFD**
  - **DFI**
  - **USAID**
  - **Bilateral Partners**
  - **Community Partners**
  - **UND P**
  - **UN Women**
  - **UNICEF**
  - **ICR C**
  - **ICJ C**
<table>
<thead>
<tr>
<th>National Key Result Areas (KRA)</th>
<th>Sector</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2020</td>
<td>2021</td>
<td>2022</td>
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</tr>
<tr>
<td>Security (Public sector)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Enhanced public safety and order</td>
<td></td>
<td></td>
<td>Level of crime rate per 100,000 people</td>
<td>2,704</td>
<td>2,544</td>
<td>2,468</td>
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<tr>
<td></td>
<td>Reduced corruption</td>
<td></td>
<td>Corruption perception index ranking</td>
<td>158 (2019)</td>
<td>156</td>
<td>153</td>
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</table>

**CONTRIBUTING PARTNERS**

**Public Sector**

- **Line Ministry/ Central Agency (Lead):**
  - ZHRC
  - MoHAC
  - JSC
  - NPA
  - ZRP
  - ZACC
  - OPC
  - MoDWV
  - A
  - MoFED
  - MoPLSW
  - Parliament
  - Ministry
  - Transport

- **Prov. Gov’t:**
  - Provinicial Councils
  - Metropolitan Councils

- **Local Aut.:**
  - Admistrators Council

- **Stat. Body/Para:**
  - All local authorities

- **Other:**
  - • LSZ Traffic Safety Council
  - Private Security Companies
    - • CATC
    - • Childline
    - • Musasa Project
    - • Save the Children
  - • Community leader
  - • Traditional leaders
  - • UNDP
  - • UNICEF
  - • IOM
  - • UNO DC
  - • INT ERP OL
  - • SAP CO
  - • UNHCR
<table>
<thead>
<tr>
<th>National Key Result Areas (KRA(s))</th>
<th>Sector</th>
<th>Sector Outcome</th>
<th>Sector Performance Indicator</th>
<th>Baseline</th>
<th>NDSI Yearly Sectoral Targets</th>
<th>CONTRIBUTING PARTNERS</th>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2020</td>
<td>2021</td>
<td>2022</td>
</tr>
<tr>
<td>Property rights secured</td>
<td></td>
<td></td>
<td>Property rights score</td>
<td>27.6% (2018)</td>
<td>30%</td>
<td>34%</td>
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<tr>
<td></td>
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<td></td>
<td>Property rights index ranking</td>
<td>123 (2019)</td>
<td>119</td>
<td>115</td>
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<tr>
<td>Human rights improved</td>
<td></td>
<td></td>
<td>Human Freedom Index</td>
<td>Partially free</td>
<td>Free</td>
<td>Free</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Mo Ibrahim Index</td>
<td>44.7%</td>
<td>50%</td>
<td>55%</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Universal Human Rights Index (% Recommendations Implemented)</td>
<td>70%</td>
<td>75%</td>
<td>80%</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Number of confirmed administrative justice and human rights abuse cases reported</td>
<td>630</td>
<td>820</td>
<td>1,065</td>
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<tbody>
<tr>
<td>OPC, MoDWVA, MoFED, MoPLSW, Parliament</td>
<td>cils Metropolitan Councils</td>
<td></td>
<td></td>
<td>a Project Justice for Children Trust</td>
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<tr>
<td>Ministry of Lands, OPC, Land Commission, Surveyor General, Ministry of Local Government</td>
<td>Ministers of State, Raral and urban councils</td>
<td>LSZ, ZHRC</td>
<td>REIZ Council of Land Surveyor A Land Developers Cooperative Societies</td>
<td>NANGO WILSA</td>
<td>ZWLA</td>
<td>• Community leader s • Traditional leader s</td>
<td>ARIPO WIP O</td>
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<td>National Key Result Areas (KRA s)</td>
<td>Sector</td>
<td>Sector Outcome</td>
<td>Sector Performance Indicator</td>
<td>Baseline</td>
<td>NDSI Yearly Sectoral Targets</td>
<td>CONTRIBUTING PARTNERS</td>
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<tr>
<td>Natio nal Unity, Peace and Reconciliati on</td>
<td>Social sector</td>
<td>Improved social cohesion</td>
<td>Number of Incidents of conflict</td>
<td>530</td>
<td>1500</td>
<td>2000</td>
<td>2500</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Legislative and policy framework for peace recommended and adopted</td>
<td>5 recommendations made</td>
<td>5 recommendations made</td>
<td>5 recommendations made</td>
<td>5 recommendations made</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Improved peace and tranquillity</td>
<td>Number of truth telling and truth seeking programs accessible to citizens as provided for in the Constitution and NPRC Act</td>
<td>0</td>
<td>At least 1 program per district</td>
<td>At least 4 programs per district</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Infrastructures for peace building, including Conflict Early Warning Early Response (CEWER) system established</td>
<td>10</td>
<td>35 peace structures</td>
<td>50 peace structures</td>
<td>70 peace structures</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>Number of persons affected by conflicts who have been given assistance (disaggregated by sex, age, disability, category and location)</td>
<td>50</td>
<td>100 per province</td>
<td>500 per province</td>
<td>500 per province</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Number of documented historical conflict narratives and conflict risk models defined by periods and geographical areas</td>
<td>1</td>
<td>1 per province</td>
<td>1 per province</td>
<td>1 per province</td>
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</table>

1 Programs to target districts as the nation prepares for elections
### Macroeconomic Framework: 2021-2030

<table>
<thead>
<tr>
<th>Year</th>
<th>Real GDP at market prices (Million ZWL$)</th>
<th>Nominal GDP at market prices (Million ZWL$)</th>
<th>Real GDP Growth (%)</th>
<th>GNI Per Capita Income (US$)</th>
<th>GNP Per Capita Income (US$)</th>
<th>GDP Deflator</th>
<th>Inflation (Annual Average) %</th>
<th>Formal Employment (000)</th>
<th>% of People in Extreme Poverty</th>
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</thead>
<tbody>
<tr>
<td>2021</td>
<td>19,593.3</td>
<td>2,399,087.7</td>
<td>7.4</td>
<td>1,842.16</td>
<td>1,273.85</td>
<td>10.4</td>
<td>13.4</td>
<td>963.2</td>
<td>24.5</td>
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<tr>
<td>2022</td>
<td>20,663.4</td>
<td>2,454,501.9</td>
<td>5.5</td>
<td>2,137.08</td>
<td>1,596.55</td>
<td>11.1</td>
<td>12.3</td>
<td>1,094.7</td>
<td>19.2</td>
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<tr>
<td>2023</td>
<td>21,735.0</td>
<td>2,512,112.9</td>
<td>5.2</td>
<td>2,712.65</td>
<td>2,071.84</td>
<td>12.0</td>
<td>10.5</td>
<td>1,236.6</td>
<td>15.4</td>
</tr>
<tr>
<td>2024</td>
<td>22,872.3</td>
<td>2,560,739.9</td>
<td>5.2</td>
<td>2,960.74</td>
<td>2,351.57</td>
<td>13.6</td>
<td>7.5</td>
<td>1,398.4</td>
<td>12.3</td>
</tr>
<tr>
<td>2025</td>
<td>24,013.3</td>
<td>2,610,451.6</td>
<td>5.0</td>
<td>3,207.33</td>
<td>2,623.22</td>
<td>15.6</td>
<td>4.9</td>
<td>1,572.8</td>
<td>10.1</td>
</tr>
<tr>
<td>2026</td>
<td>25,211.7</td>
<td>2,660,266.6</td>
<td>5.0</td>
<td>3,396.91</td>
<td>2,896.23</td>
<td>19.0</td>
<td>4.7</td>
<td>1,769.0</td>
<td>9.6</td>
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<tr>
<td>2027</td>
<td>26,448.4</td>
<td>2,710,199.4</td>
<td>4.9</td>
<td>3,571.23</td>
<td>3,159.10</td>
<td>22.9</td>
<td>4.3</td>
<td>1,985.9</td>
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<tr>
<td>2028</td>
<td>27,589.1</td>
<td>2,760,132.3</td>
<td>4.3</td>
<td>3,721.25</td>
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<tr>
<td>2029</td>
<td>28,770.3</td>
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### National Accounts (Real Sector)

<table>
<thead>
<tr>
<th>Year</th>
<th>Real GDP at market prices (Million ZWL$)</th>
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<td>1,398.4</td>
<td>12.3</td>
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<td>2025</td>
<td>24,013.3</td>
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<td>25,211.7</td>
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<td>2027</td>
<td>26,448.4</td>
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<td>30,812.7</td>
<td>47,017.6</td>
<td>60,551.6</td>
<td>37,299.0</td>
<td>32,245.9</td>
<td>23,637.5</td>
<td>7,668.7</td>
<td>42,831.3</td>
<td>68,576.7</td>
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<tr>
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</tr>
<tr>
<td>Overall Balance</td>
<td>30,812.7</td>
<td>47,017.6</td>
<td>60,551.6</td>
<td>37,299.0</td>
<td>32,245.9</td>
<td>23,637.5</td>
<td>7,668.7</td>
<td>42,831.3</td>
<td>68,576.7</td>
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<tr>
<td>% of GDP</td>
<td>-1.28</td>
<td>-1.54</td>
<td>-1.70</td>
<td>-0.93</td>
<td>-0.72</td>
<td>-0.48</td>
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<td>-0.29</td>
<td>-0.65</td>
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<tr>
<td>Public Debt</td>
<td>1,972,84</td>
<td>2,297,79</td>
<td>2,545,06</td>
<td>2,743,227</td>
<td>2,890,036</td>
<td>3,190,239</td>
<td>3,274,254</td>
<td>3,375,353</td>
<td>3,476,011</td>
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<tr>
<td>% of GDP</td>
<td>8.34</td>
<td>1.09</td>
<td>7.72</td>
<td>9.2</td>
<td>.69</td>
<td>.13</td>
<td>.50</td>
<td>.64</td>
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<th>Balance of Payments Accounts</th>
<th>420,475.23</th>
<th>433,344.45</th>
<th>471,493.00</th>
<th>511,621.70</th>
<th>553,298.88</th>
<th>621,934.50</th>
<th>615,791.70</th>
<th>625,806.30</th>
<th>624,120.80</th>
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<tbody>
<tr>
<td>Exports (Million ZWL$)</td>
<td>420,475.23</td>
<td>433,344.45</td>
<td>471,493.00</td>
<td>511,621.70</td>
<td>553,298.88</td>
<td>621,934.50</td>
<td>615,791.70</td>
<td>625,806.30</td>
<td>624,120.80</td>
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<tr>
<td>% of GDP</td>
<td>17.53</td>
<td>14.23</td>
<td>13.2</td>
<td>12.8</td>
<td>12.4</td>
<td>12.5</td>
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<td>10.4</td>
<td>9.5</td>
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<tr>
<td>Imports (Million ZWL$)</td>
<td>430,184.46</td>
<td>469,116.53</td>
<td>532,381.80</td>
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<td>751,842.80</td>
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<td>728,825.90</td>
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<tr>
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<td>17.9</td>
<td>15.4</td>
<td>15.0</td>
<td>15.4</td>
<td>15.2</td>
<td>15.1</td>
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<td>41646.71</td>
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<td>43,123.20</td>
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<tr>
<td>% of GDP</td>
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<td>1.4</td>
<td>0.4</td>
<td>0.7</td>
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<td>3.4</td>
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<td>0.60</td>
<td>0.60</td>
<td>0.60</td>
<td>0.60</td>
<td>0.60</td>
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| Deposit Corporations Survey | 492,185.02 | 861,323.79 | 1,507,315.66 | 2,260,974.00 | 2,826,218.70 | 2,967,529.00 | 3,115,906.00 | 3,271,701.00 | 3,435,286.00 |
| Broad Money (Million ZWL$)  | 492,185.02 | 861,323.79 | 1,507,315.66 | 2,260,974.00 | 2,826,218.70 | 2,967,529.00 | 3,115,906.00 | 3,271,701.00 | 3,435,286.00 |
| Growth %                   | 75.0       | 75.0       | 50.0       | 25.0      | 5.0       | 5.0       | 5.0       | 5.0       | 5.0       |