The national development strategies of Africa and South Asia

A synthesis report

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1 Introduction and methodology

1.1 Introduction

This report analyses 87 national development strategies[1][2] from 59 countries in Africa and Asia (see Table 1), providing a comprehensive review of current development planning in these regions. The sample covers a diverse mix of coastal and landlocked nations, resource-rich and resource-poor economies, and countries at different stages of development. This review offers insights into how these nations foresee their economic transformation.

The period covered by the strategies varies, from short-term plans targeting the period 2021–2025 to long-term visions extending to 2050. Among the short-term strategies are those of Afghanistan (2021) and Benin (2025), while the long-term strategies include Morocco (2030), Rwanda (2050), and Zanzibar (2050). Several countries have multiple parallel strategies: for example, a long-term plan setting out high-level goals and a shorter five-year plan providing more operational detail.

The strategies share common economic transformation themes, particularly the shift from dependence on primary commodities towards more diversified, industrialised economies. However, they differ in their specific approaches to achieving this transformation, and the role of private investment. Most strategies explicitly acknowledge the private sector as a key driver of development, though their methods for attracting and supporting private investment vary.

This report examines the strategies of these countries, focusing on:

- high-level economic and social goals;
- approaches to public and private investment;
- priority sectors identified for investment;
- specific policies to achieve their objectives; and
- how they address implementation challenges.

It also explores how these strategies view private sector participation in development, including the balance between domestic and foreign investment, the use of public-private partnerships (PPPs), and priority sectors for investment.

1.2 Methodology

This report was produced by a small multi-disciplinary team of economists and data scientists using generative AI tools. First, team members manually summarised a small sample of strategies. These summaries were then used as a target to replicate using generative AI, applying a range of different prompting strategies. After an optimal prompt was devised, a short summary was generated for each of the 87 national development

[1] These are all national development strategies, except Tanzania, which has separate strategies for Zanzibar and mainland Tanzania, which are treated as separate countries for this report.
[2] Strategies for individual cities and regions were excluded as were – in the case of extensive multi-volume strategies – companion volumes, supporting analysis, retrospective reviews, and so on.

strategies (see Annex 1). The summaries formed the basis for the report's narrative sections, and focusing on preferred private investment.

The comparative analysis is organised under three key sections: high-level economic development goals; private sector investment; and implementation plans and challenges. One prompt was designed for each section, as well as prompts for the introduction and conclusion of the report. Sector summaries report on a particular economic sector cutting across all 60 countries and were generated by a separate series of prompts which first extracted the relevant information and then condensed it.

A full account of the methodology is contained in Annex 2 and samples of the specific prompts used are included in Annex 3.

1.3 Report structure

The rest of this report includes:

2. Comparative analysis of national development strategies
3. Sector-by-sector overview
4. Conclusion with key insights

Annexes:

1. Individual strategy summaries
2. Full AI methodology
3. Prompt library

Table 1: Report coverage: national development strategies by country and period

Country	Target year	
	Short term	Long term
Afghanistan	2021 [link]	
Algeria		2030 [link]
Angola	2025 [link]	2050 [link]
Bangladesh	2025 [link]	2041 [link]
Benin	2025 [link]	
Bhutan	2029 [link]	
Botswana	2023 [link]	2036 [link]
Burkina Faso	2025 [link]	
Burundi	2027 [link]	
Cabo Verde	2021 [link]	2026 [link]
Cameroon		2030 [link]
Central African Republic	2021 [link]	
Chad	2021 [link]	2030 [link]
Comoros	2021 [link]	
Côte d'Ivoire	2025 [link]	2040 [link]
Democratic Republic of the Congo	2023 [link]	
Djibouti	2024 [link]	2035 [link]
Egypt	2020 [link]	2030 [link]
Equatorial Guinea		2035 [link]
Eswatini	2028 [link]	
Ethiopia		2030 [link]
Gabon	2025 [link]	
Ghana	2025 [link]	2057 [link]
Guinea	2020 [link]	2040 [link]
Guinea-Bissau	2025 [link]	
India	2023 [link]	
Kenya	2027 [link]	2030 [link]
Lesotho	2023 [link]	
Liberia	2023 [link]	2030 [link]
Madagascar	2023 [link]	2030 [link]
Malawi	2022 [link]	2063 [link]
Mali	2023 [link]	
Mauritania		2030 [link]
Mauritius	2021 [link]	2030 [link]
Morocco		2030 [link]
Mozambique	2025 [link]	2035 [link]
Namibia		2030 [link]
Nepal		2043 [link]
Niger	2026 [link]	

Country	Target year	
	Short term	Long term
Nigeria	2025 [link]	2050 [link]
Pakistan	2018 [link]	2025 [link]
Republic of the Congo	2022 [link]	
Rwanda	2024 [link]	2050 [link]
Sao Tome and Principe	2024 [link]	
Senegal	2023 [link]	2050 [link]
Seychelles	2023 [link]	2033 [link]
Sierra Leone	2023 [link]	2025 [link]
Somalia	2024 [link]	
South Africa		2030 [link]
South Sudan	2024 [link]	2040 [link]
Sri Lanka		2030 [link]
Sudan		2031 [link]
Tanzania	2026 [link]	
The Gambia	2021 [link]	
Togo	2022 [link]	
Tunisia	2025 [link]	2035 [link]
Uganda	2025 [link]	2040 [link]
Zambia	2026 [link]	2030 [link]
Zanzibar		2050 [link]
Zimbabwe	2025 [link]	2030 [link]

2 Comparing national development strategies

This section presents a comparative analysis of national development strategies using three broad criteria: 1) High-level development goals, 2) Private sector investment, and 3) Implementation goals and challenges. The analysis highlights common development planning patterns while recognising each nation's unique contexts and challenges.

2.1 High-level development goals

Most African national development strategies set explicit gross domestic product (GDP) growth targets, typically ranging from 5 per cent to 10 per cent annually. For example, Rwanda targets 9.1 per cent growth through to 2024, Nigeria aims for 4.6 per cent through to 2025, and Togo seeks 7.6 per cent by 2022. Countries starting from a particularly low level of development tend to set particularly ambitious growth targets, with Uganda targeting 7 per cent, Guinea-Bissau 7.5 per cent, Tanzania over 8 per cent, and Rwanda 9.1 per cent, respectively. In contrast, more developed countries sometimes set more moderate targets, like Nigeria's 4.6 per cent. However, this is not a consistent pattern. Some relatively advanced countries, such as India (at 9 per cent), set extremely ambitious growth targets, In India’s case, this may reflect that economic growth in India (and South Asia more broadly) has been higher and more sustained than in sub-Saharan Africa over the last 30 years or so.

Many strategies explicitly target reaching upper-middle-income status, often within similar timeframes. For example, Rwanda is aiming for upper middle-income status by 2035, Uganda by 2032, and Zambia by 2030. The Asian strategies analysed show a similar pattern: Pakistan aims to become an upper-middle-income country by 2025, while Sri Lanka targets an upper-middle-income status by 2030.

There are clear regional differences in how strategies define human development goals. East African countries often set detailed poverty reduction targets: Rwanda aims to eliminate poverty, while Uganda targets reducing poverty to 15.5 per cent.[3] In contrast, West African countries, including Guinea and Togo, take a broader approach, framing human development goals around ‘inclusive growth’ and ‘improved living standards’.

Several southern African nations directly link economic and human development goals to employment targets. South Africa aims to cut unemployment from 25 per cent to 6 per cent, while Zimbabwe targets an 80 per cent increase in formal employment rates. This explicit connection between economic growth and job creation is more prevalent in the strategies of southern African countries, perhaps due to the region’s long history of mass formal employment, particularly in the mining sector.

Most of the strategies emphasise moving towards economic diversification, particularly in resource-dependent economies. This appears prominently in the strategies of Zambia (which targets moving away from dependence on copper), Nigeria, the Republic of the Congo, and South Sudan (which targets reducing oil dependence). However, diversification

[3] Note: The National development strategy of Rwanda does not mention the poverty line it considers for measurements, whereas Uganda’s national development strategy (2025) mentions $1 as the poverty line.

is not limited to resource-dependent economies. For example, Bangladesh aims to reduce its reliance on the ready-made garments industry.

Another near-universal aspiration across the analysed strategies is to increase human development, both in the short term and long term. Terms like skills development, training, human capital, technological capability, and innovation capacity, feature prominently, as seen in Rwanda's 2050 vision and Uganda's 2040 plan.

While landlocked countries often prioritise infrastructure, regional integration, and trade corridor development – as seen in Rwanda and Uganda's strategies – several coastal nations also spotlight these areas. For example, Somalia's strategy emphasises regional trade corridors. This may be due to its strategic location as a potential transit route, or because its limited infrastructure forces reliance on neighbouring countries' ports.

2.2 Private sector investment

Nearly all of the strategies analysed position the private sector as the primary engine of economic growth and job creation. Governments provide an enabling role through policy, regulation, and infrastructure development.

The strategies often set ambitious targets for private investment. Rwanda's 2024 plan targets increasing private investment from 14.4 per cent to 21.2 per cent of GDP, with more modest targets for public investment growth (from 8.3 per cent to 9.9 per cent of GDP). Madagascar's 2023 plan targets private investment of 18.81 per cent of GDP while aiming to maintain significant public investment in infrastructure. Egypt's 2030 strategy calls for doubling private investment to 30 per cent of GDP, and transforming the private sector's capabilities in technology and innovation.

The strategies are less clear about how these ambitious private investment targets are to be achieved. Many strategies seem to rely on regulatory and investment climate reform to attract private investors, and often leave the details to be defined at a later date. Many strategies also discuss PPPs and mixed approaches: for example, Guinea's 2020 strategy expects the private sector to provide 38.2 per cent of total financing through PPPs – but, again, the details of the arrangements are often unclear. Ghana's 2025 strategy stands out for its explicit public subsidy for private investment, committing 2 billion Ghanaian cedi (GHS) in guarantee facilities for large enterprises.

Most strategies lack detailed mechanisms for managing potential tensions between public and private interests. While several, such as Morocco's 2030 plan, urge businesses to embrace the transition to a green economy, few outline how private sector incentives will be aligned with public goals, beyond general environmental reforms.

Almost all of the strategies target increased exports, but African strategies are less likely than their Asian counterparts to have specific export promotion strategies. Again, Ghana is a notable exception, setting clear goals including attracting foreign students to Ghanian universities.

The strategies of southern African countries pay particular attention to manufacturing and export orientation – perhaps because of the region's relatively advanced industrial base. Zambia's 2026 strategy emphasises private sector-led industrialisation and adding value in agriculture, mining, and manufacturing. Zimbabwe's 2030 vision focuses on developing a diversified and competitive manufacturing sector to move away from commodity dependence.

Many African strategies, particularly those of Malawi, Nigeria, and Uganda, highlight concerns about ‘import dependence’, reflecting a traditional import-substitution approach to industrialisation. Zanzibar’s strategy explicitly calls for import substitution, although it calls for export-oriented growth as well.

Almost all strategies, across Africa and Asia, seek to promote small and medium-sized enterprises (SMEs), although many use different terms. Kenya's 2027 strategy sees micro, small, and medium-sized enterprises (MSMEs) driving economic inclusion through value chains across agriculture, manufacturing, and services. Uganda's 2025 strategy sets a target of the private sector contributing 80 per cent of GDP and generating 77 per cent of formal jobs. Despite high ambitions and broad commitments, many strategies rely on loosely-defined schemes to build capacity, seed industrial clusters, or expand access to credit. Few mention large-scale public funding for small enterprises, with Ghana’s credit guarantee scheme being a rare exception.[4] This may be because SME financing is often viewed as the role of banks and other private lenders.

Asian strategies highlight private sector dynamism, while maintaining a strong role for the state. India’s plan to become a ‘developmental state’ targets both public and private investment, relying on policy reforms to attract new private investment, with subsidies and PPPs playing a more targeted role. Pakistan's 2025 strategy envisions private sector-led development, driven by reforms, as in India, but complemented by public investments, particularly in skills development and infrastructure. Sri Lanka's 2030 plan calls for a balanced approach characterised by private sector-led growth, while also increasing public investment following fiscal consolidation.

The strategies of small island nations like the Seychelles and Mauritius include approaches that focus on specific competitive advantages. The Seychelles' 2033 strategy aims to attract both domestic enterprise and foreign direct investment (FDI) in targeted sectors like tourism and financial services, in particular FinTech. The strategies of São Tomé and Cape Verde also emphasise tourism, while Mauritius' 2030 plan prioritises financial services in its role as the ‘gateway to Africa’.

A key pattern across the strategies is the push for private sector participation in areas traditionally managed by the state. They often recognise that the state lacks the resources to fund critical services alone, as in the Democratic Republic of the Congo's 2023 plan, which specifically promotes private investment in social infrastructure through PPPs.

In most cases, strategies suggest a division of labour. Within education, for example, most strategies see the state taking responsibility for primary education, with the private sector more involved in vocational training. In a few strategies, the private sector takes on a large part of the state’s traditional role. Somalia's 2024 strategy acknowledges that the private sector already provides essential services like education and healthcare, but this is a special case. Moreover, across the strategies, some core services, such as water infrastructure, are still viewed as essential public services.

[4] This does not imply such schemes do not exist, only that they are not specifically mentioned in national development strategies. Many countries have state-backed credit guarantee schemes to support bank lending targeted at certain sectors, including SMEs.

2.3 Implementation plans and challenges

The national development strategies we analysed vary widely in their level of detail, from end goals to policy measures and implementation plans. Some, such as Rwanda 2024 and Uganda 2025, include specific numerical targets across multiple sectors, along with defined implementation arrangements. In contrast, many strategies with longer time horizons, like Zambia 2030 and Tunisia 2035, are more directional. They outline broad priorities but stop short of setting specific targets. Instead, they leave more detailed analysis to supporting documents, not the strategy itself.

Detailed policy proposals are even rarer. While many acknowledge challenges and outline broad policy solutions, few set out specific reforms in detail. India is an exception, explicitly naming bills and acts it aims to pass or repeal. In general, specific projects, such as infrastructure projects or new services – are more likely to be discussed in detail than more clearly-defined regulatory reforms.

PPPs feature prominently as an implementation mechanism across many strategies, though the level of detail varies considerably. Some provide concrete plans: Kenya 2027 discusses establishing a PPP Project Facilitation Fund and comprehensive regulations. Similarly, Morocco 2030 identifies PPPs for renewable energy programmes and integrated industrial platforms. However, many strategies that note the importance of PPPs, like South Sudan 2024 and Sierra Leone 2025, do not mention specific sectors or implementation approaches.

Financial constraints, particularly in the public sector, emerge as the most commonly cited implementation challenge across both African and Asian strategies. Many strategies highlight limited domestic revenue mobilisation, high debt levels, and shrinking aid flows. For example, Gambia 2021 notes limited government fiscal space as its main challenge, while Guinea-Bissau 2025 cites limited administrative, institutional, financial, and human resource capacity.

Infrastructure deficits are another widely cited challenge, particularly in African strategies. Sudan 2031 details infrastructure bottlenecks in energy, electricity, and roads. Similarly, Sierra Leone 2025 emphasises poor infrastructure as a key constraint. While Pakistan 2025 also mentions infrastructure challenges, Asian strategies generally place less emphasis on them than their African counterparts.

Institutional capacity constraints feature prominently, particularly in post-conflict or fragile states. South Sudan 2024 highlights low institutional capacity and expertise gaps while calling for technical assistance. Similarly, Somalia 2024 warns that severe resource and capacity constraints will undermine implementation efforts. These challenges are discussed more in strategies from fragile states than more stable countries.

Strategies often acknowledge challenges without presenting detailed solutions. Most potential responses are kept ‘on the table’ in some sense, and receive at least a mention. Shorter-term strategies tend to offer more specific solutions and detailed implementation frameworks, perhaps because these are closer to execution and have undergone more planning and agreement. For instance, Kenya 2027 outlines clear reforms in fiscal consolidation, revenue enhancement, and PPP frameworks, whereas Rwanda's longer-term vision for 2050 is more directional. Togo’s 2022 five-year strategy details implementation steps, while its 2040 vision remains more aspirational. However, there are exceptions: Ghana's long-term (2057) strategy provides detailed implementation steps for some areas.

Many strategies identify external shocks as key implementation risks, though the types of shocks vary by region. African strategies frequently cite climate-related risks such as droughts and floods (for example, Guinea-Bissau 2025, Zimbabwe 2025), while Asian strategies, such as Pakistan 2025, place greater emphasis on global economic volatility and trade-related shocks.

2.4 Conclusion

The analysis of 87 national development strategies from 60 African and Asian countries reveals several common themes in how nations picture their economic transformation. Despite different timeframes and targets, there is remarkable consistency in the broad objectives: achieving sustained economic growth, diversifying economies, and improving human development outcomes. These goals appear consistently across strategies, regardless of geography, resource endowment, or development status.

In nearly all strategies, the private sector is seen as the primary engine of growth and job creation, with governments playing an enabling role through policy reform, regulation, and infrastructure development. However, there is a notable gap between ambitious private investment targets and the mechanisms needed to achieve them. Most strategies rely heavily on regulatory reform and PPPs, though they often lack detailed implementation frameworks.

The degree of implementation planning varies significantly across national strategies. Shorter-term plans generally have more concrete targets and specific policy proposals compared to longer-term visions. While financial constraints, infrastructure deficits, and institutional capacity limitations are widely acknowledged implementation challenges, there is often a lack of detail around proposed solutions. This gap between ambition and detailed execution planning, combined with widespread concerns about external risks ranging from climate shocks to global economic volatility, highlights the complex challenges these nations face in turning their development visions into reality.

3 Sector deep-dives

This section looks at the focus sectors in detail, highlighting nations planning significant sector investments and public and private investments listed by different countries.

The sections on financial services, access to credit, and SMEs may appear similar but they have distinct focuses. The financial services section examines the financial system and the banking sector, focusing on the interests of service providers. The access to credit section focuses primarily on improving the credit system from the borrower’s point of view. Meanwhile, the SMEs section covers SME finance but also explores other SME-related activity such as infrastructure support, trade, and integration.

3.1 Financial services

The analysed national development strategies set out diverse approaches to developing financial services, reflecting the diverse state of countries’ financial systems, their geographic location, and their broader economic ambitions. In Africa, countries such as Mauritius and Zanzibar plan to become financial gateways and hubs, with detailed investment plans for developing comprehensive financial services infrastructure, including offshore banking and capital markets. This contrasts with countries such as Madagascar and the Democratic Republic of Congo, which focus more on fundamental challenges, like expanding basic financial access and strengthening sector stability. These differences highlight the development gap within Africa itself. While some countries are pursuing advanced financial sector reforms, others are still establishing basic financial infrastructure and increasing low banking penetration rates (such as Madagascar’s 6 per cent).

Limited data from Asian countries makes direct regional comparisons challenging. Countries such as Bhutan and Pakistan make only brief mentions of financial ecosystem reform, while India discusses the issue solely in the context of financial inclusion. However, the overall pattern suggests more developed economies focus on sophisticated financial technology infrastructure and integration with global markets, whereas less developed countries prioritise basic financial inclusion and modernising banking sector systems. This contrast is evident between Mauritius's ambition to become a financial gateway with foreign investment priorities, versus Uganda's focus on expanding fundamental services including pensions and insurance. The relationship between financial sector development and broader economic transformation goals is particularly visible in countries such as Tanzania, whose strategy explicitly links strengthening the financial sector to resource mobilisation and allocation efficiency.

The analysis of approaches to the financial services sector faces several important limitations, primarily due to a lack of detail. Many strategies do not have specific information about the investments targeted in this area, while for others, financial sector investment needs are lumped together within the discussion for broader economic reforms. This lack of specific information makes direct comparisons difficult. Also, the lack of quantitative investment targets (except at the highest level) across most countries further complicates assessing relative priorities and development paths.

3.2 Access to credit

Lack of access to credit is a universally recognised barrier to development across the analysed strategies. This issue is emphasised in discussions of SMEs, as well as in developing priority sectors.

Regional patterns in how countries approach this issue are clearly evident. African nations, particularly Zambia, Zimbabwe, and Ghana, have the most comprehensive focus on credit access initiatives, naming projects and, in some cases, specific funding commitments. For example, Ghana's strategy outlines concrete financial commitments relating to credit, including a GHS 2 billion guarantee facility for large enterprises and a GHS 600 million programme for MSMEs. Zambia's strategy names a series of funds linked to promoting entrepreneurship, including the Skills Development Fund and the Science, Technology and Innovation Youth Fund, although it does not state precise resource allocations or explain in detail how the funds will operate and who will benefit. Likewise, Zimbabwe's strategy names a series of funds, including the Mining Industry Loan Fund directed at small-scale miners, but again doesn't detail their extent or eligibility requirements.

In contrast, Asian countries such as Bangladesh, India, and Pakistan, mention credit access primarily in the context of SME development, but without the same level of detailed strategic planning or explicit funding commitments. India's strategy mentions an unnamed fund aimed at supporting priority economic sectors. However, it is unclear whether subsidised credit is part of the offering.

Approaches to credit access in national strategies often appear to depend on the level of economic development of the countries concerned, and the maturity of their existing financial infrastructure. More developed economies tend to frame access to credit as a regulatory issue requiring policy reform, while poorer nations, particularly those in Africa, approach it as a fundamental infrastructure challenge that requires significant investment. This is evident in Zambia's 2026 and 2030 strategies, which emphasise the need for system-wide investment in financial access frameworks, and in Zimbabwe's 2025 plan, which links broader financial sector strengthening to improved credit access.

The role of public and private investment varies significantly across different strategies, with most targeting a hybrid approach. Public sector involvement focuses mostly on creating enabling environments through policy reforms, as seen in the approach to public financial management improvements in the Uganda 2025 strategy. That said, there are examples of public finance being directed to subsidise credit in specific sectors, as illustrated by the example of Ghana cited above.

Private sector participation in increasing access to credit is emphasised in the strategies of countries such as Zambia and Sierra Leone, where the private banking sector is expected to drive credit expansion for MSMEs once the appropriate regulatory framework is established. The implicit assumption in many Asian strategies is that the ultimate source of expanded credit will be the private sector. However, specific mechanisms for attracting and implementing private investment are often left undefined, and there is often room for public subsidies for credit delivered via private financial institutions.

In most cases, the discussion of access to credit presumes that the issue – particularly for SMEs – is mobilising domestic credit. However, for some countries, especially those largely shut out from international financial markets, such as Zimbabwe, strategies emphasise the need to mobilise foreign capital investment. However, there is often a lack of detail about policy in this area, and the term ‘foreign capital’ often refers to the country’s global diaspora, rather than to politically disinterested foreign investors.

Moreover, while many strategies acknowledge the challenges of accessing credit, they do not set out the investment requirements or timeframes for implementing their proposed initiatives. This makes it difficult to assess the true scale of funding needed. Additionally, the level of detail on the targeted initiatives across the strategies varies significantly, making it difficult to compare strategies by region and by individual country.

3.3 SMEs

The strategies show a high degree of consistency in how they characterise the SME sector, with most viewing it as a critical driver of growth and employment. The same broad interventions are mentioned nearly universally, with strategies emphasising access to credit for SMEs, and availability of business development services and supporting infrastructure, particularly market-connecting infrastructure and industrial clusters.

Approaches to SME development vary across the strategies, reflecting different economic contexts and development priorities. In Africa, countries such as Kenya and South Africa highlight SMEs as drivers of job creation and economic inclusion, with Kenya pointing to the sector's 24 per cent contribution to GDP. Ethiopia has particularly ambitious targets for the sector, aiming to increase the number of manufacturing sector SMEs from 2,000 to 11,000. In contrast, Asian countries typically adopt a more targeted approach. Bhutan focuses on SMEs in specific sectors such as farming, agro-processing, and handicrafts, which it supports through industrial clusters.

There are regional differences in how strategies envision the roles of public and private SME investment. African strategies tend to emphasise public investment in infrastructure and support services for SMEs, with Kenya’s strategy pointing to public investment in business development services and South Africa’s creating specific funding mechanisms for SME development. Asian strategies appear more oriented towards private sector-led development, though Bangladesh’s strategy proposes creating a small business agency, while Bhutan suggests a hybrid model of specialised financial institutions and business incubation programmes. The role of the private sector is not entirely absent from African strategies, with Zimbabwe and Madagascar’s strategies focusing on creating enabling environments to encourage private investment, recognising that both public and private capital are necessary to develop the SME sector.

The integration between public and private investment often reflect a country’s economic maturity and institutional capacity. More developed economies, such as South Africa and Kenya, offer sophisticated approaches combining public support infrastructure with private financial sector development. Kenya, in particular, has a comprehensive strategy that aims to integrate industrial clusters, value chain development, and financial support for SMEs. Rwanda’s National Innovation Fund is an innovative model which, if successful, will demonstrate how public initiatives can catalyse private sector engagement in technology development.

Several important caveats should be noted in this analysis. First, some strategies discuss SMEs mainly within broader private sector development, rather than as a separate focus area. Second, strategies use different terminology to refer to SMEs (cottage industries, micro-enterprises, etc.). This makes it difficult to isolate specific SME-targeted initiatives within strategies. Finally, while the roles of public and private investment are frequently discussed, few strategies offer specific allocation targets or clear implementation mechanisms for coordinating such investments.

3.4 Construction and real estate

The construction sector receives more detailed attention in African development strategies than in Asian ones, reflecting the different developmental stages and priorities of the two regions. For example, Kenya, Rwanda, and Tanzania focus more explicitly on developing fundamental capabilities, such as producing construction materials and building the capacity of domestic industry. Kenya’s strategy emphasises the production of affordable and green construction materials, along with the development of MSMEs in the construction sector, while Rwanda’s prioritises local production facilities for construction materials. This suggests these African countries are working to establish basic construction sector infrastructure and to reduce their dependence on imports. In contrast, Asian countries, including India, appear to focus more on urban development and the adoption of technology, suggesting a more mature construction sector where basic capabilities already exist.

Priorities also differ based on overall economic development levels and existing construction sector capabilities. Less developed countries typically emphasise building foundational capacity and infrastructure, as seen in Tanzania's focus on basic infrastructure construction, including roads, bridges, railways, ports, and airports. More developed economies tend to prioritise specialised aspects, for example, India's focus on urban housing development. This suggests that as countries develop, their construction sector priorities shift from establishing basic capabilities to optimising and modernising existing operations.

Some important caveats must be considered in this analysis. First, many strategies discuss infrastructure development without explicitly mentioning the construction sector, or fail to distinguish clearly between the construction sector and infrastructure development more broadly. Several strategies mention housing development, which implies the involvement of the construction sector, but do not explicitly discuss the sector. Taken together, these issues make it difficult to compare priorities for the construction sector across different strategies, and suggest the apparent different priorities discussed above might reflect differences in how countries categorise and discuss construction-related activities, rather than actual differences in focus.

The strategies analysed assign different roles to public investment and private investment in the construction sector. Public investment is primarily targeted at foundational infrastructure. For example, Tanzania envisages public investment funding roads, bridges, and railways, and Uganda foresees it funding urban infrastructure development. The strategies also see public investment as funding capacity-building initiatives. For example, Rwanda sees public investment supporting construction sector development, while Nepal envisages it funding quality improvement. By contrast, private investment is targeted at two key areas: housing development (as seen in the urban housing projects in India and Uganda’s strategies) and materials production (as seen in Kenya and Rwanda’s aims for private sector participation in manufacturing construction materials).

Across the strategies, several important gaps appear relating to the role of private and public construction sector investment. Many lack clear frameworks for private sector participation, despite acknowledging its importance. They also rarely specify targeted investment amounts or proportions, making it impossible to assess the relative scale of public versus private contributions targeted. Also, while PPPs are frequently mentioned in strategies, especially those of African countries, implementation mechanisms for PPPs in the construction sector are rarely specified. This creates uncertainty about how partnerships are expected to function in practice and what specific roles each sector (private and public) should play.

3.5 Transport infrastructure

Strategies contain markedly different approaches to transport infrastructure development, based on geographic, economic, and development circumstances. African strategies often strongly emphasise establishing fundamental transport connectivity through ambitious new transport construction projects, as exemplified by Guinea's comprehensive plans for the Conakry-Kankan-Bamako rail line and Kenya's specific target of 6,000km of new roads. These projects highlight the critical need to overcome basic infrastructure gaps currently limiting economic development and regional integration. In contrast, Asian countries like Bhutan and Pakistan show a more diversified approach, balancing new construction with rehabilitating existing transport assets and incorporating modern multimodal transport solutions, including dry ports and integrated logistics facilities.

There is a divergence between more and less developed nations in their transport infrastructure priorities. Less developed countries, especially those in Africa, often prioritise large-scale greenfield projects aimed at establishing or expanding basic transport networks, such as Tanzania's emphasis on transport as a priority subsector and Zimbabwe highlighting transport within broader infrastructure development. These projects are expected to have positive spillover effects in other industries where inefficient transport is a limiting factor. By contrast, more developed economies typically focus on maintaining transport infrastructure, efficiency improvements, and specialised infrastructure, like logistics hubs. For example, Bhutan's comprehensive approach includes both basic infrastructure such as roads and bridges, alongside more sophisticated elements such as dry ports and integrated railway links across the country's southern belt.

3.6 Communications infrastructure

The strategies have a varied approach to communications infrastructure development, with the African nations generally providing more detailed plans than those of their Asian counterparts. The priorities for communications infrastructure vary depending on each country's development, existing capabilities, and immediate needs. More developed nations focus on technological modernisation and advanced infrastructure, while less developed countries prioritise basic coverage and access. For example, Djibouti's strategy emphasises private sector-led technological modernisation in making communications infrastructure a critical development priority, specifically targeting 'world-class' infrastructure development. Meanwhile Sierra Leone is focused on addressing the fundamental challenges of low penetration rates and poor service quality.

The roles of public and private investment in communications infrastructure appear carefully balanced in most strategies, though specific mechanisms are not always well-defined. Togo, for example, explicitly highlights the need for FDI and PPPs to develop communications infrastructure, suggesting a strong emphasis on attracting private capital. In most strategies, including Kenya and Uganda, the public sector is viewed as enabling backbone infrastructure, universal access, and regulatory frameworks. Private investment is expected to drive service delivery and network expansion, as seen in Sierra Leone's strategy, where private investment is required for expanding network coverage and improving service quality.

Two important limitations in this analysis should be noted. First, many countries discuss digital transformation or information and communications technology (ICT) sector development without explicitly mentioning communications infrastructure, making it difficult to fully understand their priorities. Second, most strategies lack specific quantitative targets and detailed investment requirements, particularly in the split between public and private investment. Also, while PPPs are frequently mentioned as a preferred development mechanism, detail on specific structures or implementation approaches is limited, making it challenging to assess how plans will be executed in practice.

3.7 Energy infrastructure

Energy infrastructure priorities differ between strategies based on each country's developmental stage, geographical context, and economic aspirations. In Africa, Madagascar and Sierra Leone have ambitious plans for expanding electricity generation capacity, with Madagascar targeting a five-fold increase in generation, with a strong emphasis on renewable energy. This contrasts with Asian countries such as Bhutan, where focus extends beyond basic access to include more advanced infrastructure elements, such as electric vehicle charging networks, reflecting their relatively more developed energy baseline. The presence of significant natural resources, and whether countries are net energy producers or net energy users, also shapes how countries approach energy sector development in their strategies.

The distinction between developed and developing nations is apparent in their energy infrastructure priorities, particularly their approach to energy sector investments. South Africa and Zimbabwe focus on reliable and affordable electricity supply through broad power sector investments, reflecting the challenges of developing nations in establishing consistent energy access. By contrast, Bhutan emphasises sustainability and technological advancement. African nations generally prioritise expanding basic access and reducing costs, as seen in Tanzania's infrastructure priorities, while more developed countries in Asia focus on modernising existing infrastructure and incorporating sustainable technologies.

3.8 Water infrastructure

While the strategies of African nations generally have an explicit focus on water infrastructure development, no Asian strategies have a major focus on it. This could reflect different regional priorities, varying stages of existing infrastructure development, or simply differences in how explicitly water infrastructure is addressed in strategies. Pakistan is the only Asian country to sets out specific budget allocations for basic water infrastructure needs, although India reiterates goals around access to drinking water, sanitation and irrigation.

Among African nations, there is a clear divide between countries making major commitments, such as Senegal's 10 per cent budget allocation for water and sanitation, and those that merely acknowledge water infrastructure requirements as part of broader development needs. The Democratic Republic of the Congo stands out for its targeted approach to addressing urban–rural disparities in water infrastructure coverage, while Somalia frames water infrastructure within the context of other critical basic infrastructure needs. This reflects the different developmental stages and priorities of these countries.

All strategies envisage water infrastructure as being predominantly funded by public investment, with limited explicit mentions of private sector involvement or FDI. Senegal's concrete budget allocation demonstrates a strong public sector commitment, while other countries including Zimbabwe and Pakistan integrate water infrastructure within broader public infrastructure development programmes. Interestingly, while several strategies mention PPPs for general infrastructure development, none specifically detail PPP approaches for the water sector, suggesting this might be viewed primarily as a public sector responsibility.

3.9 Healthcare

The approach to healthcare investment varies significantly from country to country, and often in surprising ways. Despite starting from a low base, some African nations such as Rwanda and Uganda are pursuing more ambitious, specialised developments, including medical tourism and pharmaceutical manufacturing, often leveraging private sector participation through PPPs. This contrasts with most countries, including Bangladesh and Bhutan, which focus more heavily on expanding basic healthcare infrastructure and public spending, as exemplified by Bangladesh's goal to increase healthcare spending from 0.7 per cent to 2.0 per cent of GDP. This contrast might reflect different perspectives on the role of the healthcare sector, with some African nations using the sector to drive exports, while most countries prioritise strengthening fundamental healthcare systems for their own populations.

The role of public versus private investment emerges as a key differentiator in the approach to the healthcare sector. Countries with less developed healthcare systems, such as Tanzania, emphasise public investment in basic infrastructure and facility expansion. In contrast, countries pursuing more advanced healthcare developments, such as Rwanda and Zimbabwe, actively seek private sector participation through PPPs for state-of-the-art facilities and specialised services. This suggests a pattern whereby public investment focuses on essential healthcare infrastructure, while private investment, including potential foreign investment, is sought for more specialised and advanced healthcare services. It is worth noting that while healthcare PPPs are emphasised, particularly in African strategies, few provide detailed frameworks or specific targets for private sector participation.

Several important limitations should be considered when interpreting these patterns. First, many countries lack specific timelines for healthcare investments and detailed information about the types of healthcare facilities needed. Second, most strategies fail to explicitly mention FDI in plans to finance their healthcare development goals. Third, critical healthcare elements considered essential for comprehensive healthcare development, such as digital health infrastructure and rural healthcare facilities, are given little attention. Fourth, the varied level of detail across the strategies, with some only mentioning healthcare in passing, without specifying investment requirements, and others providing much more detail, makes analysis of the strategies more difficult.

3.10 Education

The analysis of the national development strategies reveals different approaches to education shaped by regional contexts and development levels. In Africa, Tanzania and Sierra Leone provide detailed infrastructure-focused plans, with Tanzania specifically outlining investments in school construction, dormitories, and teacher housing, while Sierra Leone emphasises rebuilding its deteriorated education system. Uganda takes a different approach by concentrating on human capital development and skills training. In Asia, Pakistan’s strategy stands out for its comprehensive investment plans, spanning both basic school infrastructure and higher education expansion, while Bhutan focuses more narrowly on standardising educational facilities and infrastructure.

The roles of public versus private investment in education vary significantly across the strategies, though public investment dominates in most cases. Strategies typically foresee public sector investment funding basic education infrastructure development, while private sector involvement is more commonly envisioned as funding technical and vocational training. Some strategies offer innovative approaches to education funding. For instance, Somalia refers to a significant private sector presence even in basic education delivery, while the government focuses on regulation and access. Djibouti’s strategy refers to implementing PPPs to reduce budget costs, while Côte d'Ivoire’s points to developing technopoles through collaboration between universities and businesses, perhaps suggesting a trend towards mixed funding models, particularly in higher education and specialised training.

Regional patterns emerge in the approach to PPPs in the education sector, with the African countries generally providing more explicit PPP education frameworks compared to Asian countries, which tend to favour traditional public funding models. This might reflect varying stages of development and different historical approaches to education in the two regions. The analysis also suggests the strategies of middle-income countries are more likely to adopt mixed approaches to education funding, perhaps due to their greater capacity to attract private investment and implement complex partnership frameworks.

There are several limitations in this analysis. First, most strategies do not specify investment needs or amounts for education, making direct comparisons challenging. Second, some countries may have separate education sector strategies not captured in their national development strategies, so their investment priorities for the sector may not be clear from the latter strategies alone. Third, the analysis does not capture education initiatives embedded within approaches to other sectors, such as technical training within industrial policy. Fourth, as stated earlier, the varying timeframes of the different strategies may influence how they address education priorities and investment needs. Finally, it is worth noting that FDI in education is not explicitly discussed in any of the strategies.

3.11 Food and agriculture

The investment priorities for the food and agriculture sector set out in the strategies reveal interesting regional and developmental distinctions. In Africa, strategies have a strong focus on developing basic food and agriculture infrastructure. This is particularly evident in the strategies of countries like Madagascar, which faces fundamental challenges relating to irrigation systems and agricultural inputs. More economically advanced African nations, such as Kenya and Algeria, focus on value chain development and processing capabilities, with Kenya specifically targeting high-value value chains, such as those for dairy, edible oils, and tea. This suggests countries at different development stages prioritise different aspects of agricultural investment, moving from basic infrastructure to more sophisticated value chain development as their agricultural sectors mature.

Many African countries aim to add value to their key agricultural products before exporting. For example Côte d'Ivoire, for example, plans on transforming cocoa and coffee processing before export, Uganda focuses on tea and dairy, Guinea on forestry products and Chad on livestock. Eswatini, Liberia and Rwanda also focus on agro-processing, though in more general terms.

Countries take different approaches to modernising agriculture and technology adoption depending on their developmental level and strategic priorities. Cape Verde, for instance, places a strong emphasis on digital agriculture systems and modernisation, while Tanzania focuses more on basic agricultural infrastructure to support broader industrialisation goals.

The strategies of Asian countries rarely mention investment priorities for the food and agriculture sector, although some, such as Sri Lanka, note challenges to the sector, such as climate change impacts.

Most strategies do not clearly separate the roles of public and private sector investment in food and agriculture. Of those that do, countries like Algeria and Mauritania strongly emphasise private sector participation in food processing and agro-food industry development, while others, like Madagascar, emphasise public investment in basic infrastructure. Strategies that do distinguish between public and private investment tend to adopt a complementary approach, with public investment typically viewed as creating enabling conditions through infrastructure and technical support, while private investment is seen as driving commercialisation and value chain development. For example, in Benin's strategy, public investment focuses on developing infrastructure for specific agricultural value chains, while private investment is encouraged in agro-industrial processing.

The strategies have several gaps. None specify investment amounts. There is also limited detail on the role of FDI and international investors, making it hard to see the full picture of agricultural sector development. The level of detail on agricultural sector investment also varies significantly across the strategies, making direct comparisons difficult and potentially masking important nuances in different approaches to the sector.

3.12 Manufacturing

Manufacturing emerges as a key priority for both African and Asian nations, though the approaches and emphasis differ. African countries, especially East Africa, offer more detailed approaches to the manufacturing sector in their strategies, with specific targets and subsector priorities. Ethiopia, Rwanda, and Uganda have comprehensive plans targeting both light and heavy manufacturing. Ethiopia's strategy focuses on expanding the number of manufacturing SMEs from 2,000 to 11,000 enterprises, Rwanda prioritises labour-intensive industries, while Uganda offers detailed plans across both light manufacturing (textiles, shoes, electronics) and heavy industry (iron/steel, cement). In contrast, while Asian countries recognise manufacturing's importance, they generally provide broader strategic outlines, with Bangladesh standing out by setting specific targets for the sector's contribution to GDP, aiming for an increase from 24.18 per cent to 30.23 per cent.

The strategies present a clear division of responsibilities for public and private manufacturing investment. Most see public investment as creating enabling conditions through infrastructure and skills development. Ethiopia directs public investment towards industrial parks and manufacturing zones, while Rwanda and Uganda emphasise government investment in power, transport, and enabling infrastructure. Zimbabwe and Sri Lanka specifically target public investment in technical training and workforce development. By contrast, private investment, particularly FDI, is positioned in the strategies as the primary driver of actual manufacturing growth. This is especially evident in countries such as Sri Lanka, whose strategy emphasises attracting FDI for textiles and leather manufacturing, and Zimbabwe, whose strategy sees foreign investment as crucial for its manufacturing transformation.

The different approaches to manufacturing development reflect their existing industrial base and development level. Less industrialised countries focus on establishing basic manufacturing capabilities, while more industrialised nations prioritise diversification and technological advancement. African nations often focus on initiating new manufacturing capabilities, particularly in labour-intensive and light manufacturing sectors, reflecting their earlier stage of industrialisation compared to Asian nations. In contrast, Asian countries emphasise diversification and upgrading existing manufacturing capabilities, such as Bangladesh's aim to diversify beyond garments.

While many strategies mention manufacturing development, they do not specify investment needs or quantitative targets, making it difficult to fully assess the scope and scale of planned developments. Also, strategies are often unclear about the implementation mechanisms for this development, and rarely not provide metrics for measuring success.

3.13 Technology

The strategies show clear patterns in technology sector development, shaped by each country's development stage and regional context. In Africa, Tanzania and Uganda prioritise foundational ICT infrastructure development through public investment, reflecting their focus on establishing basic digital capabilities. An emphasis on public sector-led basic infrastructure development suggests these countries are still working to create the enabling environment necessary for broader technology sector growth. This approach contrasts with that of more developed economies, which can focus on advanced technological innovation and commercial applications.

Asian countries generally demonstrate a more mature approach to technology sector development, with Pakistan's strategy standing out for its comprehensive nature, including initiatives such as technology parks and research and development facilities. This reflects the transition from basic infrastructure to innovation-focused development. Pakistan's emphasis on producing 'globally competitive goods and services' through planned technology parks suggests a sophisticated understanding of the sector's potential role in economic development. The narrow focus in the Seychelles' strategy on FinTech development represents a targeted approach to technology sector development, suggesting a strategy of specialisation instead of broad-based digital infrastructure development.

The strategies see divergent roles for public and private investment in the technology sector, with public investment typically focusing on foundational elements like infrastructure and regulatory frameworks. By contrast, private investment is viewed as driving commercial applications and service delivery. However, the specific mechanisms for coordinating these investments remain unclear in most cases. Countries appear to be moving towards a model where public investment creates the enabling environment for private sector innovation, though this transition is more evident in the strategies of Asian countries than African ones.

Many strategies lack specific monetary targets for technology investment, making it difficult to assess the true scale of commitment to the sector. Also, most have limited detail on specific PPP frameworks for the technology sector, particularly regarding FDI. There is also a lack of reference to mechanisms for coordinating public and private investment which could be crucial for sector development. Finally, while the strategies frequently mention technology as an enabler for other sectors, many do not include a detailed discussion of technology sector development in its own right.

3.14 Urbanisation and cities

Approaches to urban development vary significantly by region, with distinct patterns evident for the strategies of Asian and African countries. Asian nations, such as India and Pakistan, have more sophisticated frameworks for PPPs in urban development, with a particular emphasis on housing and transport infrastructure. In contrast, African countries often prioritise basic infrastructure and industrial zones, and foresee public investment as playing a more central role. This is evident in cases like Kenya, which emphasises public services and affordable housing.

Across the strategies, the public sector is typically viewed as taking the lead in providing basic infrastructure and urban planning frameworks, as seen in the emphasis on public investment in urban infrastructure in Tanzania's strategy. By contrast, strategies often aim to leverage private investment and PPPs for specific projects and service delivery. Togo provides an interesting example of mobilising private finance to provide basic infrastructure, setting a target of 20,000 new housing units through PPPs, demonstrating how countries hope to harness private sector capabilities while maintaining public sector oversight.

Local conditions and institutional frameworks appear key factors in shaping urban development priorities. Some strategies emphasise comprehensive planning approaches that integrate sustainability and spatial development, such as Morocco's focus on sustainable urban development. Others concentrate on addressing pressing local challenges and specific sectoral needs like housing and basic infrastructure. Most strategies focus on enabling private sector participation in urban services, rather than relying on direct public provision. However, the mechanisms for this private sector participation vary considerably.

This analysis has some important limitations. Many strategies do not clearly delineate between public and private roles, and few provide details of specific PPP mechanisms for urban development. Also, there is very little discussion of FDI in the urbanisation and cities sector, creating a significant gap in understanding how countries plan to attract international capital for urban development. Most strategies do not specify how countries aim to attract private investment to urban projects, and information on financing mechanisms is also incomplete, making it difficult to fully assess the planned implementation of urban development initiatives.

4 Conclusion

This report reviews the development strategies of 60 countries across Africa and South Asia. While not fully comprehensive, it covers more than half of the world's developing countries as classified by the World Bank, and virtually all of the poorest low income countries.

Our primary finding is the striking similarity of these strategy documents, despite differences in regions, income levels and even timescales. Most countries share the same ambitions for their people, both in terms of economic and human development, and regardless of different political orientations, histories and geographies.

Moreover, these strategies often function primarily as fundraising 'brochures' for governments, aimed largely at their domestic audiences. They convey messages that governments are committed to development, understand the country's challenges, and have ambitions for the future.

These strategies are high-level statements rather than detailed operational plans. They rarely include specific programmes of investment or policy reform. However, they can serve as a guide for future operational plans, especially for public sector activity and investment. While they may set expectations for domestic private actors, international private investors are offered less guidance. In general, most strategies appear not to have considered international private investors as a core audience, and therefore very little messaging, if any, is directed toward them.

Most strategies present broad policy orientations, rather than concrete programmes of executive investment action or legislative reform. They often call for market-oriented reforms without specifying which laws should change or how. Where specific details are included, they often focus on actions the government has already taken – such as past legislation or expenditure – or near-term measures already agreed upon.

Often, these strategies read like a 'laundry list' of desires and promises rather than actionable programmes. For example, many call for capacity building without specifying where the resources will come from. While such statements might be construed as invitations to investors, more likely they are appeals to international development agencies.

Where policy orientations are mentioned, they often include contradictory positions – such as promoting both export-led and import-substituting industrialisation. This suggests many strategies are designed to appease various domestic political constituencies often with new or emerging lobby groups getting added to the list, rather than crafting a coherent national development approach.

List of annexes

A.1 Annex 1: individual strategy summaries

See separate document.

A.2 Annex 2: use of AI

This report was made possible by the heavy use of generative AI tools to review documents, extract relevant content and synthesise information. This annex details how AI was used and the team's reflections on the approach. The next annex contains a library of the prompts used.

A.2.1 Generating individual strategy summaries

An individual short summary was produced for each of the 87 national development strategies in the report (see Annex 1). The summaries served as the base material for the narrative sections of the report and to extract detail on desired private investment.

The team found the best way to extract these insights from the report was to devise an extensive prompt which built up to this quite nuanced question. Therefore, each summary included the strategy's high-level development goals, specific economic and investment goals, distinguishing private from public investment, and broad regulatory reforms from specific spending commitments. Finally, they indicate the level of specific policy detail included in the strategy, highlighting whether it offers specific policy directions or broader aspirations.

Sectoral deep dives were used to identify which sectors were considered an investment priority for the country throughout the scope of its development strategy.

Each team member was assigned a country of different geographical region, size – both of population and land mass – as well as different economic development and key sectors to get a diverse group of 'test' strategies. The first four countries were Ethiopia, Egypt, Madagascar and India. Team members read their country strategy and summarised it according to the key focus questions laid out above.

The team experimented with the Claude GUI, testing various prompts and scenarios to determine which combinations produced summaries that matched the manually created equivalents. The prompts followed Claude's best practices as published on its website, in particular the "cite your sources" prompt, as well as broader prompt engineering guides.

The team then collaborated to see which prompts were effective well and which were not. They sought to determine common themes across the countries or whether each strategy required unique prompts. They also devised a series of common prompts used for all four of the test countries, and verified that the summaries generated were correct and similar to the reference summaries.

This series of common prompts was rolled out across all 87 national development strategies via the Claude API, producing an individual summary for each. The prompt is in Annex 3.

A.2.2 Generating sector summaries

Sector summaries report on a particular economic sector cutting across all 60 countries. These were generated using a two-part approach.

First, a long extract was generated (see Annex A.3.3 for the prompt). This classified the countries into three groups:

1) those where the sector was briefly mentioned;
2) those where the sector was a major focus; and
3) those where the sector was a major focus, and the strategy mentioned significant investment needs specifically.

The summaries also distinguished between the roles of public investment and private investment in each sector. This classification was based on individual summaries for all 87 strategies, as detailed in Annex 1.

These lengthy and often repetitive extracts formed the basis for the shorter narrative chapters in the final report, which were generated using the prompt in Annex A.3.4.

The prompt design process was iterative, with multiple refinement stages. First, the team tested the draft prompt for 2-3 sectors. The results were cross-checked to spot any hallucinations (the invention of facts) and the prompt was redrafted to ensure correct and consistent results. The final prompt was tested multiple times for different sectors before it was rolled out to generate sector-wise summaries for all sectors.

A.2.3 Creating the final report

The final report consists of the comparative analysis and the sector deep-dives.

The comparative analysis mirrors the structure of the individual strategy summaries, with three key sections: high-level economic development goals; private sector investment; and implementation plans and challenges. One prompt was designed for each section, as well as prompts for the introduction and conclusion of the report. Again, the narrative text Claude produced was based on the input data from Annex 1.

The prompt design process was again iterative, with extensive testing and verification. At each stage, the prompts and their responses were recorded in a centralised testing process document, along with reviews and ratings. Although fact-checking every statement in the narrative was not feasible to manually, the team used their familiarity with the strategy summaries and general development economics background to assess the overall accuracy of the output.

During experimentation, the team followed Anthropic's recommended best practices for interacting with Claude. These included: assigning Claude a specific role to frame the output appropriately; providing clear instructions for step-by-step reasoning; requesting specific citations and references to support all arguments; and using Markdown to clearly separate different parts of the prompt and structure the response. The team actively engaged with Claude throughout the experimentation process, requesting feedback on how to improve instructions.

Despite all the care taken to devise clear and tailored prompts, extensive manual redrafting was necessary, mostly to improve style and readability. While a comprehensive fact check of all 87 documents was not feasible, specific content was introduced into the final report, either based on the summaries or the original strategy documents.

A.2.4 What have we learned about large language models?

The production of this report followed a 'dual control' approach. It was made possible – at the high speed and low cost achieved – by leveraging large language models (LLMs), while a traditional research team played a crucial role in shaping the report's content, manually drafting some sections for comparison purposes, reviewing model outputs, and ultimately redrafting large parts of the final copy.

We see enormous potential for this technology to enable larger scale and lower cost literature reviews beyond what was previously possible. However, in many respects, the technology is still not mature. We recommend careful human oversight and co-creation now and for the foreseeable future.

Despite all the advances in LLMs since transformers were first developed in 2017, hallucination is still a significant problem and warnings about the accuracy and veracity of statements generated by LLMs are still (more or less prominently) displayed in their user interfaces.

While careful prompting can reduce hallucinations to some extent, we found even a methodical and highly structured approach fails to guarantee accurate responses based only on the source data. All LLMs remain prone to introducing facts from their training data or simply inventing a plausible form of words.

We went to great lengths to prompt the LLM to surface source material and generate intermediate pieces of text – an example of prompt-chaining – and also to state directly where information was absent or incomplete. However, this may have heightened the opposite risk: that models omit relevant information, returning only a partial sample of data that may not fully represent the entire document.

We took a technically simple approach to this, relying on the latest models' long context windows (over 100,000 tokens / words). Although technical solutions, like retrieval-augmented generation (RAG) systems offer an alternative, our experiments with these suffered from the same problems. These problems may partly stem from the high computational cost of RAG models which often leads to usage limits imposed by providers. But it seems to us that the orientation of these models – to generate plausible text similar to examples they've seen in the past – may represent a fundamental barrier to their effectiveness in analysis tasks, where the accuracy of the final output is paramount.

On the other hand, even a team of human researchers tasked with a review at this scale would produce a partial and somewhat biased summary of the source material, imposing their own views to a greater or lesser extent. Such an enterprise would have taken a larger team significantly longer, and using LLMs removed a lot of 'grunt work' from the review. However, much of that time saved was then spent again in tailoring task-specific prompts, extensive manual quality control of the outputs, and ultimately redrafting large sections of the final copy.

As such, our assessment is that currently LLMs are an interesting but unproven tool to replace human research effort, posing risks to timely and accurate final outputs. Instead, for bespoke qualitative analysis at scale, LLMs can be used to enhance the efficiency of a traditional research team that recognises the need for close human oversight and involvement.

A.3 Annex 3: prompt library

A.3.1 Summarise an individual strategy document

Role

You are a development economist. You will answer questions about a national development strategy.

Instructions

Steps

First, find the quotes from the document that are most relevant to answering the question, and then print them in numbered order. Quotes should be relatively short. If there are no relevant quotes, write “No relevant quotes” instead. Then, answer the question, starting with "Answer". Do not include or reference quoted content verbatim in the answer. Don’t say “According to Quote [1]” when answering. Instead make references to quotes relevant to each section of the answer solely by adding their bracketed numbers at the end of relevant sentences. The answer should be concise, but can extend to up to half a page of text to ensure it covers the key content.

You will respond to the following questions when asked by the user:

Question 1: [Q1] What are the strategy's high level goals for economic performance, human development and private sector performance?

Question 2: [Q2] What are the priorities for public investment, private investment and economic reform? Does the document outline any required policy actions in these areas?

Question 3: [Q3] What are the priority sectors for investment that are explicitly highlighted in the document? In addition to those explicitly mentioned, please highlight what the document says about investment needs in the following sectors: finance, construction, infrastructure, healthcare, education, food and agriculture, manufacturing, technology, SMEs. If the strategy does not mention these sectors, state that explicitly.

Question 4: [Q4] Does the strategy identify challenges with achieving its plan, and are these linked to public or private investment? Does the strategy talk about public-private partnerships, and if so in what sectors? Does the strategy distinguish between domestic and foreign private investors?

Thinking

Read the whole document carefully and think step-by-step through the question before replying. **If the question cannot be answered by the document, say so.** You should caveat if there is relevant content that only indirectly or incompletely answer the question.

Output format

The format of your overall response should look like what’s shown in the sample response. Make sure to follow the content, formatting and spacing exactly - do not generate additional text outside of this structure, not even to indicate you have understood or are thinking.

Sample response

Quotes

1. “Company X reported revenue of $12 million in 2021.”

2. “Almost 90 per cent of revenue came from widget sales, with gadget sales making up the remaining 10 per cent.”

Answer

Company X earned $12 million. [1] Almost 90 per cent of it was from widget sales. [2]

A.3.2 Write a chapter of comparative analysis

Role

You are a development economist. Your task is to write a report about these summaries of national development strategies.

Instructions

Write the section of the report which compares the similarities and differences between the strategies' high-level goals for economic performance and human development. Do any patterns emerge across different regions (e.g. Africa vs. Asia and North vs. East vs. West vs. Southern Africa) or time horizons?

Base your analysis strictly on what is explicitly stated in the strategies. Do not make claims about entire regions unless you can find supporting evidence from several countries in that region. When comparing across regions or time periods, describe the patterns you observe without making causal claims about why these differences exist.

Thinking

For each point you want to make:

1. Find the specific supporting text

2. Check if this applies to other strategies

3. Note which strategies don't mention this topic

4. Only then write your observation

For each claim about patterns across regions or types of countries:

1. List all relevant examples that support the pattern

2. List any examples that contradict the pattern

3. Verify you have at least 3 supporting examples from the region

4. Only then write your observation

Output

Write your response in paragraphs. Do not include a generic opening paragraph. Use specific references and country examples to support each claim. Comment on the entire range of countries, including in both Africa and Asia.

A.3.3 Write a sector summary – part 1

Role

You are a development economist. Your task is to write a section of a report about an economic sector specified by the user, {sector}.

Instructions

Thinking

Read the whole document carefully, in particular the "Investment needs by sector" sub-sections, and think step-by-step through the question before replying. You should caveat if there is relevant content that only indirectly or incompletely answer the question. Explicitly mention any gaps in the information and note where the information is implied and not explicit. In your response, ensure you comment on the entire range of countries, including in both Africa and Asia.

Output

The format of your responses should look like what's shown in the sample responses. Make sure to follow the content, formatting and spacing exactly - do not generate additional text outside of this structure, not even to indicate you have understood or are thinking.

Questions

Answer the following questions:

Question 1 [Q1]: Extract all references to {sector}, indicating which strategy each one came from:

- Read through the entire document carefully and mention the number of countries that you reviewed to answer the question

- Extract ALL explicit mentions of {sector} and note the country and year of the strategy

Question 2 [Q2]: Using the answer to Q1, list all the countries that mention {sector}:

- Provide a complete list of countries for Asia and Africa

- Categorise mentions (major focus vs. brief mention)

Question 3 [Q3]: Of the countries mentioned in your answer to Q2, which ones highlight significant investment needs in the sector?

- List all countries with explicit investment needs

Question 4 [Q4]: What is the role of private investment and public investment in helping the sector grow?

- Analyse separately for:

  - Public investment initiatives

  - Private investment/PPP approaches

- Provide example countries for each analysis point mentioned above

Sample responses

If the {sector} were energy the response would look like this:

Question 1

Algeria, 1960, "Energy infrastructure including construction of nuclear plants at Algiers and Oran"

Algeria, 1960, "Target to expand the coverage of the electricity grid to 100 per cent by 1970, enabled by private-public partnerships"

India, 1955, "Energy: diversifying to hydroelectric power thanks to government investment"

…

Question 2

Africa

Major Focus:

- Algeria (plans to increase nuclear generation and grid coverage)

…

Brief Mentions:

…

Asia

Major Focus:

…

Brief Mentions:

- India (mentions ambition to diversify to hydroelectricity)

Question 3

Africa

1. Algeria

- Construction of 2 new nuclear plants

- Expand electricity grid to 100 per cent coverage by 1970

…

Question 4

Public Investment Initiatives

1. India: government funding for hydroelectric dams

…

Private Investment / PPP approaches

1. Algeria: PPP to achieve electricity grid investment

…

A.3.4 Write a sector summary – part 2

Use this text to write a narrative of 3-4 paragraphs as to what countries' plans are for the sector and why different countries have different priorities. If relevant include differences between Asian and African countries and more vs. less developed countries. Include examples from the 'short list' of key countries to illustrate your points. Discuss the roles of public and private investment, and in particular foreign investment / FDI if mentioned, including example countries from that section. Also include a couple of 'Gaps and Limitations' to caveat the paragraphs.