



Ulandssekretariatet
LO/FTF Council

Danish Trade Union
Council for International
Development Cooperation

Zimbabwe

Labour Market Profile

2014

This Labour Market Profile is a yearly updated report that provides a broad overview of the labour market's situation and development. The report is based on the latest data available and following trends. Each section has also accesses to the sources' links that can be used to go more in-depth on selected themes.



Zimbabwe- Labour Market Profile 2014

Executive Summary

Zimbabwe implemented elections in July 2013 and Robert Mugabe won the election. According to many of Zimbabwe trade unions and the International Trade Union Confederation (ITUC), the elections were not free and fair. A new Constitution from 2013 has been considered as a “new path” which includes explicit rights as equal pay for equal work, fair wage, as well as the right to collective bargaining and strike for all workers, except security forces.

Since 2009, Zimbabwe’s economy has started to recover from the 1999-2008 crises that saw economic output cumulatively decreasing by more than 45%. The country is ranking very low on many key labour market indexes such as Doing Business, Government Indicators, and the Gini Index. On the other hand, Zimbabwe has experienced a high increase of gross capital formation, which reached 25% of GDP in 2012 in comparison with 2% in 2006.

In Zimbabwe a large majority (83%) of the employed population is unskilled with a gender ratio of 92 males per 100 females. It is also a country with a vast young population, i.e. two out five (42%) of the population is below the age of 15 years. The unemployment rate has been estimated at 4% while it is 7% among the youth.

The average worker is subsisting in poverty and the informal economy is expanding. Economic and labor policies have not been consciously targeted at the non-formal economy. In practice, more than 4 out of five (85%) of the total labor force have difficulties entering the shrinking formal labour market. Thus, the Zimbabwean workers from the formal sector can be interpreted as a minority in terms of paying income taxes and be a member of the country’s social security systems. For example, only 8% of the population is members of a medical aid scheme while 39% of paid employees are benefitting from medical insurance. The Government has suggested a new compulsory National Health Insurance Fund as a levy to finance health care. However, the Zimbabwe Congress Trade Union (ZCTU) resist any new compulsory levies on

employees until management of the fund are investigated thoroughly.

The lowest-paid employee receives US\$238 a month in the mining sector. It is lower than the poverty guideline for the country. On the other hand, the highest minimum wage is US\$329 per month in the cement, lime & allied industry sector. Trade unions have protested that there is no real increment on the basic salary since wage raise was effected on housing and transport allowances only.

Although the Government has proposed a 27% increase of wages for government employees, which is the biggest increase for state employees since Zimbabwe adopted the U.S. dollar as its official currency five years ago; it remains lower than the election promises from 2013.

ZCTU experienced fractionalization in 2011 and it has been registered that membership declined 5.8% in the period from 2011 to 2013. Thousands of workers in the country have had their respective union fees deducted from their salaries, but employers are not remitting them to the unions.

The Zimbabwe Chamber of Informal Economy Association (ZCIEA) has had 1.3 million members in 2005 but dropped significantly due to the government’s Operation Restore Order. Today, ZCIEA has only close to 31,000 members. It demonstrates that the country’s workers are confronting big challenges of strengthening the society’s cohesion and organization.

The non-remittance of union dues by employers makes it difficult for the union movement to sustain itself financially. Currently, there are listed 42 Collective Bargaining Agreements (CBAs) and around 5% of the labour force is covered by CBAs. Since 2009, tripartite social dialogue has not reached meaningful consultation on social and economic policies that could improve the situation.

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Trade Unions

Trade unions in Zimbabwe ¹ (2014)	
Number of trade unions (ZCTU)	31
Dues (standard; per member)	35 cents
Members of trade unions (federations)	177,284
Trade union members share of labour force	2.5 %
Trade union members to waged workers	7.2 %
Female member share of trade unions (ZCTU)	29 %
Affiliated trade unions from the informal economy (ZCIEA)	30,699
Number of CBAs (2013)	42
Workers covered by CBAs	355,000
Share of workers covered by CBAs	5 %
Labour force (2012)	7,085,000

Although the Labour Law provides private sector workers the right to form or join unions, conduct legal strikes, and bargain collectively, other provisions of legislation are abrogating these rights, though. E.g. the Ministry of the Labour and Social Welfare has the authority to veto collective bargaining agreements perceived to be harmful to the economy as well as to appoint an investigator who can, without prior notice, enter trade union premises, question any employee, and inspect and copy any books, records, or other documents.²

The law also encourages the creation of workers' committees in enterprises where less than 50% of workers are unionized. These committees exist in parallel with trade unions. Their role was to negotiate on shop floor grievances, while that of the trade unions was to negotiate industry level issues, notably wages. According to the U.S. Annual Country Reports on Human Rights Practices, the parallel body has been regarded by trade unions as an arrangement that employers could potentially use to undermine the role of the unions.

Public sector workers are governed by a different law. They are not allowed to form and join trade unions, but instead may form associations that can bargain collectively and strike without notice.

Collective bargaining agreements (CBAs) applied to all workers in an industry, not just union members. Unions representing at least 50% of the workers can bargain with the authorization of the Minister of Labor and Social Welfare. It is estimated that 42 CBAs are in

function and around 5% of the worker force are covered by agreements.

The law prohibits antiunion discrimination, provides that the labor court handle complaints of such discrimination, and may direct that workers fired due to such discrimination be reinstated. Migrant workers can join unions if they work in industries for which there are unions, and their rights are covered. Domestic workers are unionized and are protected by labor laws.³

No worker organizations have been independent of the government and/or political parties. The Zimbabwe Federation of Trade Unions (ZFTU), a government-created alternative labour federation, has been involved in labour-related discussions with employers and labour organizations.

It has been estimated that the 2.5% of the labour force are members of trade unions and in terms of the waged workers it is calculated at 7.2%. In the three sectors: Banking, domestic workers and teacher association there are more females than men.

Zimbabwe Congress of Trade Unions (ZCTU)⁴

The Zimbabwe Congress of Trade Unions (ZCTU) was founded in 1981 and formally consists of 31 affiliated trade unions.⁵ The ZCTU has structures at national, regional and district levels.

ZCTU has played an active political role in the democratic development of Zimbabwe.⁶ It used to be close to the ZANU-PF ruling party, but turned increasingly away due to a perceived growing authoritative and corrupt government. ZCTU was a leading force behind the creation of the opposition party Movement for Democratic Change, whose leader Morgan Tsvangirai has a history as General Secretary of ZCTU. According to the Friederich Ebert Stiftung,⁷ ZCTU has close ties to the MDC party.

ZCTU experienced fractionalisation after its 7th Congress in 2011. The legitimacy of the congress was challenged by former president Lovemore Matombe and allied union leaders. Several unions have since been disaffiliated and the high court has ruled in favour of the current ZCTU leadership.⁸ It is also important to note that out of the seven unions that were disaffiliated there have also been some break

away groups. They have formed new unions which have already applied to re-join ZCTU as new unions. ZCTU is still trying to work out a plan, though. Some of these unions if not all have taken more than 80% of the members away from the old leaders who were fighting the legitimacy of the August 2011 new leadership.⁹ It is estimated that the ZCTU membership decreased 5.8% in the period 2010/11 to 2013.

Zimbabwe Federation of Trade Unions (ZFTU)

The Zimbabwe Federation of Trade Unions (ZFTU) also exists, which is a government-created alternative trade union federation. It is largely created to undermine the political influence of the trade union movement. It did not wield real influence over labour negotiations, and was rarely included in labour related

discussions with employers' and workers' organisations.¹⁰ ZFTU is an umbrella trade union in their own right because they are registered as such under the Zimbabwean laws. However, ZFTU's system is such that their affiliate unions are not independent to do business or negotiate on behalf of their membership, this is done by ZFTU. Therefore ZFTU does not have well established affiliates. Usually ZFTU is mentioned when some national programmes where the government is involved.¹¹

There are some unions which are not affiliated to any trade union centres. Some of these are government workers and some are private companies who do not want publicity.

Trade Unions in Zimbabwe ¹²							
Members, Dues, Collective Bargaining Agreements (CBA) and Occupational Safety and Health committees							
Trade Union / Trade Union Centre	Affiliation to national trade union centre	Total Members	Female Members (2012/13)	Dues	Number of CBAs	Workers covered by CBAs	Number of OSH committees at workplaces
ZCTU Zimbabwe Congress of Trade Unions		156,285 (2013)	44,854	35 cents	42 (2013)	All non managerial members of staff	One regional subcommittees
NFTU National Federation of Trade Unions		12,000	-	-	-	-	-
ZFTU Zimbabwe Federation of Trade Unions		No data	-	-	-	-	-
Zimbabwe Technical Employees Association	ZCTU	3,500	N/A	35 c	1	Non managerial	100%
Zimbabwe State Universities	ZCTU	N/A	3,500	35 c	Still to negotiate one	Non managerial	100%
Cement and Lime Workers Union of Zimbabwe	ZCTU	1,285	78	35 c	1	Non managerial	100% of the total companies
Commercial Workers Union of Zimbabwe	ZCTU	8,000	3,000	35 c	1	Non managerial	70%
National Mine Workers Union	ZCTU	23,000	1,209	35 c	1	Non managerial	100%
Zimbabwe Security Guard Union	ZCTU	3,362	798	35 c	1	Non managerial	60%
Federation of Food Workers Union of Zimbabwe	ZCTU	8,000	2,400	35 c	1	Non managerial	80%
General Agriculture Plantation workers union	ZCTU	7,000	2,333	35 c	1	Non managerial	75%
Motor Vehicle Manufacturers Workers union	ZCTU	387	-	35 c	1	Non managerial	100%
National Engineering Workers Union	ZCTU	8,242	242	35 c	1	Non managerial	90%
National Union of Clothing	ZCTU	3,625	1,262	35 c	1	Non managerial	100%
Railway Artisan Union	ZCTU	678	37	35 c	1	Non managerial	100%
Railway Association of Enginemen	ZCTU	422	6	35 c	1	Non managerial	100%
Transport and General Workers Union	ZCTU	2,800	127	-	-	-	N/A

Zimbabwe Amalgamated Railwaymen's Union	ZCTU	4,633	750	35 c	1	No managerial	100%
Zimbabwe Bank and Allied Workers Union	ZCTU	5,019	3,011	35 c	1	Non managerial	100%
Zimbabwe Catering and Hotel Workers Union	ZCTU	7,000	2,100	35 c	1	Non managerial	100%
Zimbabwe Chemicals, Plastics, and Allied Workers Union	ZCTU	3,805	-	35 c	1	Non managerial	90%
Zimbabwe Construction and Allied Trader Workers Union	ZCTU	4,500	246	35 c	1	Non managerial	100%
Zimbabwe Domestic and Allied Workers Union	ZCTU	783	407	35 c	1	Non managerial	No established committee
Zimbabwe Education and Scientific Workers Union	ZCTU	7,145	2,400	35 c	1	Non managerial	70%
Zimbabwe Metal Energy Workers Union	ZCTU	8,448	-	35 c	1	Non managerial	80%
Zimbabwe Public Service Association	ZCTU	3,916	N/A	35 c	1	Non managerial	100%
Zimbabwe Furniture, Timber and Allied Traders Union	ZCTU	7,040	-	35 c	1	Non managerial	100%
Zimbabwe Textiles Workers Union	ZCTU	1,389	-	35 c	1	Non managerial	50%
Zimbabwe Pulp and Paper Workers Union	ZCTU	480	65	35 c	1	Non managerial	100%
Zimbabwe Education & Scientific w/u	ZCTU	6,682	2,400	35 c	1	Non managerial	80%
Zimbabwe Teachers Association	ZCTU	41,107	21,000	35 c	1	Non managerial	-
Zimbabwe Tobacco Industrial Workers Union	ZCTU	3,000	300	35 c	1	Non managerial	70%
Zimbabwe Urban Councils Workers Union	ZCTU	6,212	2,550	35 c	1	Non managerial	100%
Zimbabwe Union of Journalists	ZCTU	750	250	35 c	1	Non managerial	100%

Employers' Organisations

(EMCOZ) Employers' Confederation of Zimbabwe¹³

EMCOZ members are employers' associations and employers from the private and parastatal sectors. The members employ an aggregate workforce of over two million. EMCOZ advises members on labour legislation, industrial relations, working conditions and contracts. EMCOZ arranges training seminars, negotiates in industrial disputes and also represents employers in tripartite committees as the equal partner vis-à-vis ZCTU.

EMCOZ is represented in the following tripartite bodies: National Social Security Authority, Zimbabwe Occupational Health and Safety Council, National Manpower Advisory Council, Wage and Salary Advisory Board, Retrenchment Committee, National Disability Board and ILO Tripartite Consultative Committee.

The director of EMCOZ is Mr. John Mufukare.

Central Tripartite Structures

Mediation and Arbitration

Industrial disputes are referred to a labour officer. If settlement cannot be reached, disputes are referred to the Labour Court. The Labour Court consists of a Senior President and an unspecified number of other judges. The social partners do not nominate members to the Court. Establishment of the Labour Court is enshrined in the new draft constitution.¹⁶

Wages and Salaries Advisory Board

The board gives advice to the Government on the fixing of minimum wages and benefits for employees. The board is set by ministerial decree and not required by law.¹⁶

Other bi/tripartite organs

- National Social Security Authority
- Health Insurance Scheme
- Retrenchment Board
- Tripartite Negotiating Forum (TNF)
- Local Authorities
- Zimbabwe Occupational Health and Safety Council
- National Manpower Advisory Council
- National Disability Board
- National Steering Committee on Decent Work Agenda.

National Labour Legislation

Constitution

The current constitution is from 1979.¹⁴ It has been amended several times since then. A new Constitution¹⁵ was approved by referendum in 2013. Both the old Constitution and the new Constitution from 2013 ban forced labour, though the old constitution mentioned exceptions to the ban. Both guarantees the freedom of association, though the new constitution explicit enshrining such rights as equal pay for equal work, fair wage, as well as the right to collective bargaining and strike for all workers except security forces. The new constitution also bans child labour and has sections explicit on labour rights and on work and labour relations.

Labour Act¹⁶

The Labour Act of 1985 amended in 2005, sets fundamental rights of employees, general conditions of employment and defines unfair labour practices. It regulates trade unions and employers organisations, as well as industrial disputes and collective action. The act also establishes and regulates institutions of Advisory Council and minimum wage setting, Workers Committees, Employment Councils, the Labour Court, and Employment Agencies.

The Labour Law is under review since the Government of National Unity (GNU) and the government is proposing Labour Market Flexibility, which the unions are contesting, threatening to report to the International Labour Organization (ILO).

Factories and Works Act¹⁷

The Factories Act of 1996, regulates registration and control of factories, conditions of work in factories, the supervision of the use of machinery, and sets precautions against accidents for persons employed on structural work.

Prohibition of Child Labor and Minimum Age for Employment

The law prohibits most forms of child labor. Under the law a child between the ages of 13 and 15 can work as an apprentice if the work is an integral part of a course of training or technical or vocational education. However, the law is not effectively enforced. The Ministry of Labour lacks personnel and the commitment to carry out inspections or other monitoring. Child labor is primarily in the informal sectors and not closely monitored by inspectors.¹⁸

Other legislations exists which regulates and sets standards and restrictions for the labour market.¹⁹

ILO Conventions

Ratified ILO Conventions ²⁰		
Subject and/or right	Convention	Ratification date
Fundamental Conventions		
Freedom of association and collective bargaining	C087 - Freedom of Association and Protection of the Right to Organise, 1948	2003
	C098 - Right to Organise and Collective Bargaining Convention, 1949	1998
Elimination of all forms of forced labour	C029 - Forced Labour Convention, 1930	1998
	C105 - Abolition of Forced Labour Convention, 1957	1998
Effective abolition of child labour	C138 - Minimum Age Convention, 1973	2000
	C182 - Worst Forms of Child Labour Convention, 1999	2000
Elimination of discrimination in employment	C100 - Equal Remuneration Convention, 1951	1989
	C111 - Discrimination (Employment and Occupation) Convention, 1958	1999
Governance Conventions		
Labour inspection	C081 - Labour Inspection Convention, 1947	1993
	C129 - Labour Inspection (Agriculture) Convention, 1969	1993
Employment policy	C122 - Employment Policy Convention, 1964	Not ratified
Tripartism	C144 - Tripartite Consultation (International Labour Standards) Convention, 1976	1989
Up-to-date Conventions		
Working time	C014 - Weekly Rest (Industry) Convention, 1921	1980
Industrial relations	C135 - Workers' Representatives Convention, 1971	1998
Vocational Training	C140 - Paid Educational Leave Convention, 1974	1998
Labour Administration	C150 - Labour Administration Convention, 1978	1998
Employment Policy	C159 - Vocational Rehabilitation and Employment (Disabled Persons), 1983	1998
	C155 - Occupational Safety and Health Convention, 1981	2003
Occupational Safety and Health	C161 - Occupational Health Services Convention, 1985	2003
	C162 - Asbestos Convention, 1986	2003
	C170 - Chemicals Convention, 1990	1998
	C174 - Prevention of Major Industrial Accidents Convention, 1993	2003
	C176 - Safety and Health in Mines Convention, 1995	2003
<p>Fundamental Conventions are the eight most important ILO conventions that cover four fundamental principles and rights at work. Equivalent to basic human rights at work.</p> <p>Governance Conventions are four conventions that the ILO has designated as important to building national institutions and capacities that serve to promote employment. In other words, conventions that promotes a well-regulated and well-functioning labour market.</p> <p>In addition, there are 71 conventions, which ILO considers "up-to-date" and actively promotes.</p>		

Trade Union Rights Violations

According to the International Trade Union Confederation (ITUC), trade unions in Zimbabwe were characterized under an “extreme risk” in 2013.²¹ First of all, there were a historic power sharing deal and a constitutional referendum and general elections was a political priority for 2013. Around 94% of the voters supported the new constitution, which introduced improvements on civil rights. However, the draft was released just three weeks before the referendum. Moreover, it was not translated into local languages, which prevented broad and informed consultation.

Secondly, in terms of freedom of association, there were registered that trade unions are subject to extensive restrictions imposed by law and government policy. In principle, civil liberties are recognized in the Constitution of Zimbabwe and in the Global Political Agreement (2008), which includes freedom of assembly and association. However, police and security forces have applied laws, e.g. Public Order and Security Act (2002) and the Criminal Law Act (2006), to curb basic civil liberties and trade union rights. It was demonstrated during the run-up to the constitutional referendum in 2013, where rights experts from United Nations alarmed an intimidation and harassment, physical violence and arrests against civil society actors, mostly working on human rights issues.²²

Thirdly, ITUC has also draw attention towards the restrictions on the establishment of trade unions. The issue is that the Registrar has absolute discretion over registering unions, as well as the Minister of Public Service has absolute discretion power over registration of public service officers.²³ For example, The Zimbabwe Metal Energy and Allied Workers’ Union (ZMEAWU) have been waiting a for registration certificate from the public authorities for seven years.

Fourthly, non-remittance of union dues has become a widespread practice in Zimbabwe and has brought unions into financial difficulties in terms of their activities and their existence.²⁴

Fifthly, excessive restrictions on the right to strike since broad categories of workers are excluded from

the rights to strike, e.g. public sector workers, health services and transport and communication services.

Sixthly, it has been registered that employers often refuse to bargain in good faiths, i.e. employers frequently abuse institutional weaknesses by creating a deadlock in the bargaining process. Although ZCTU affiliates were able to engage in collective bargaining with employers without interference from the government, there were reports of government interference in the ZCTU’s internal activities. Agricultural workers have also reported verbal and physical attacks by employers during negotiations. Moreover, interferences in collective agreements are also noted as employers often disrespect collective agreements and court decisions.

ITUC registered eleven cases in 2013 which are followed up upon on the survey of violations of trade union rights.²⁵

The U.S. Annual Country Reports on Human Rights Practices has also registered several trade union rights violation cases, among others: Police continued to deny application by the ZCTU to hold organized events; and a clear pattern of acts of intimidation, including arrests, detentions, violence, and torture by the security forces against ZCTU-affiliated trade unionists’ events nationwide.²⁶

The Trade Union Congress in England expressed their deep concern over anti-trade union action and discrimination against trade union officials in the financial sector in Zimbabwe.²⁷

Zimbabwe has 11 closed Freedom of Association cases in the ILO; and no active or follow-up cases.

ILO Complaints Procedure ²⁸	
Freedom of Association cases	
Active	0
Follow-up	0
Closed	11

Working Conditions

Wages and earnings		
Monthly average and legal minimum wages		
	Source	US\$
Average wage (2009)	Calculations based on ILOSTAT ²⁹	253
Median wage (2009)		246
Minimum wage Highest (2014)	WageIndicator ³⁰	329
Minimum wage Lowest (2014)		238
Minimum wage for a 19-year old worker or an apprentice (2013)	Doing Business ³¹	247
Ratio of minimum wage to value added per worker (2013)		2.43
<i>Ratio of minimum wage to value added per worker denotes the minimum wage share of labour productivity. Reported as ratio of minimum wage to value added per worker in the Doing Business Report.³²</i>		

The National Joint Negotiating Council between Government and civil servants negotiators reached a new salary structure for civil servants. The lowest-paid employee receives US\$238 a month in the mining sector. It is lower than the poverty guideline for the country which is US\$253 based on the lowest monthly government salary after 2011. Also according to the 2011 labor force survey by ZimStats, only 42% of workers earned an income sufficient to support the minimum food requirement for a family of five.³³ On the other hand, the highest minimum wage is US\$329 per month in the cement, lime & allied industry sector.

Trade unions have protested that there is no real increment on the basic salary since the raise was effected on housing and transport allowances only. Worker representatives expressed that the least-paid Government employee should earn a salary at par with the obtaining poverty datum line, which the Consumer Council of Zimbabwe pegs at about US\$540.³⁴ The Government has argued that civil servants' salaries account for 70% of revenue, which has left no room for fiscal maneuvering.³⁵

There was little or no enforcement of the work hour's law, particularly in agricultural and domestic worker sectors. These jobs generally provide extremely low income with a minimum wage of US\$100 and US\$85 a month, respectively; and poor working conditions and do not offer adequate worker protections.³⁶ In

comparison, a minimum wage for a 19-year old apprentice is at US\$247.

Unlike most other Sub-Saharan African countries the agricultural sector did not have the lowest wages. Likely because industrialised farms are more common to subsistence farming in Zimbabwe, and they are recovering from the land reforms in the early 2000s.³⁷

Thousands of workers in the country have had their respective union fees deducted from their salaries but employers are not remitting them to the unions. This has impacted on the operations of the country's largest labour body as most unions are now finding it difficult to pay their subscriptions.³⁸

The number of accidents at work in Zimbabwe that result in deaths or serious injuries is high. During the period January – August 2013, the National Social Security Authority had recorded 49 deaths and 3,641 due to work-related accidents. It reflected a trend of a marginally decrease compared to the same period in 2012. However, the statistics remain a cause for concerns.³⁹ Most of the fatalities and injuries were recorded in the transport and mining sectors; and 88% of accidents that occur in the workplace are attributable to human errors and 6% by machines and their layout.

The HIV prevalence rate was estimated at 15% in 2012, which has been reduced from 27% in the 1998.⁴⁰ The workplace is an entry point for a HIV/AIDS response, therefore social partners and other stakeholders work with the National Aids Council in implementing workplace programmes on HIV/AIDS.

Economic sanctions mainly from western countries have led Zimbabwe to open up for Chinese investment, and now up Chinese control up to 80% of mines and manufacture. Chinese controlled workplaces have a reputation of worse working conditions.⁴¹

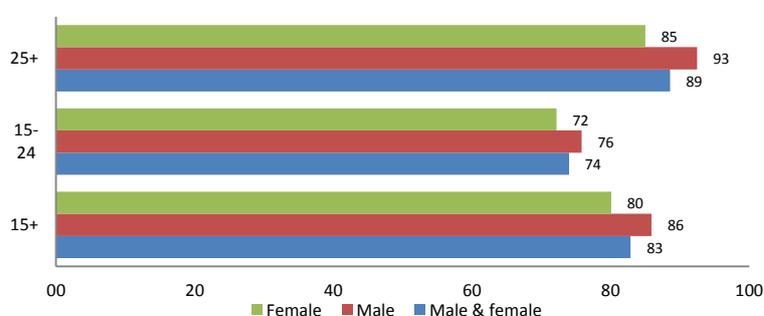
There were approximately 170 labor inspectors responsible for investigating labor-related violations and for enforcing labor laws, including those covering children. It equals one inspector per 41,677 workers in the labour force. However, these services are under-resourced and ILO recommends one inspector per 40,000 workers in less developed countries.⁴²

Workforce

Employment rates⁴³

(2012), Age and Sex distribution

Sex	Age	Employment rate
Male & female	Total	15+ 83 %
	Youth	15-24 74 %
	Adult	25+ 89 %
Male	Total	15+ 86 %
	Youth	15-24 76 %
	Adult	25+ 93 %
Female	Total	15+ 80 %
	Youth	15-24 72 %
	Adult	25+ 85 %



Zimbabwe has a total population of 14.1 million people out of which 7 million constitute the labour force. It has been estimated that only 480,000 workers were formally employed in 2008, down from 3.6 million in 2003.⁴⁴ Other estimations show that one out of four (24%) employed is in the formal sector while informal 'sector' enterprises (14%) and households (62%) cover the rest.

The latest data for working poverty show that 67% of working poor living for under US\$1.25 a day and 87% for under US\$2. Zimbabwe had a higher rate of working poor in 2005 than the Sub-Saharan average, and this was before the peak of the hyperinflation in 2008.

Working Poor⁴⁵

Age 15+

Region	Share of workers in total employment	
	1.25 US\$ a day	2 US\$ a day
Zimbabwe (2005)	67 %	87 %
Sub-Saharan Africa (2004)	49 %	71 %
Sub-Saharan Africa (2011)	44 %	67 %

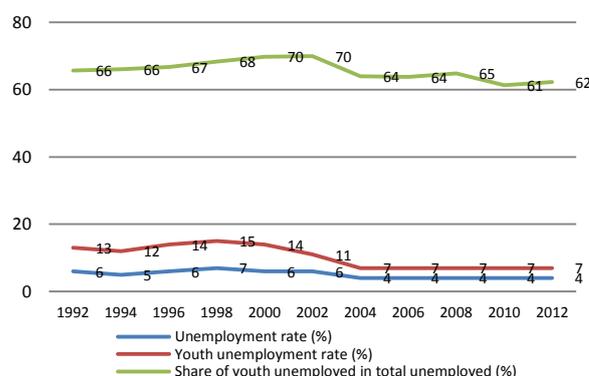
Working poor measures employed people living for less than US\$1.25 and US\$2 a day, as proportion of total employment in that group.

Unemployment

Based on ILO estimations the unemployment rate is at 4% while it is at 7% among the youth. On statistical terms, both rates have been on a decline since 2000

and stabilized since 2005. Most unemployment is hidden by employment in the informal sector where cash incomes are extremely low. ILO calculates a structural unemployment rates as high as 80%.⁴⁶ It indicates, though, that there is a large employment deficit in Zimbabwe.

Unemployment rate 1992-2012 (%)⁴⁷



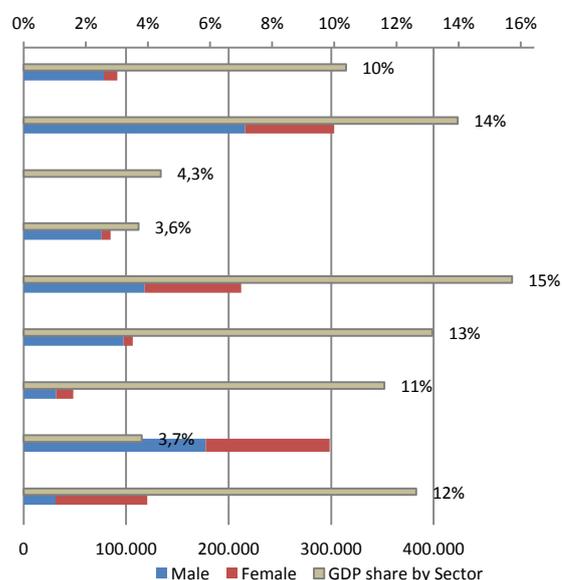
A Poverty Assessment study showed that the youth have the highest unemployment rate among all the age groups in the labour force. More or less three out of five (62%) of the unemployment workers are youth. The rate of youth unemployment with regard to both formal and informal sectors of the Zimbabwe economy stood at 19% for females and 11% for males.⁴⁸

Young people fall into the category of the most severely affected by unemployment: out of the total of 530,000 unemployed persons, no fewer than 300,000 were aged between 15 and 24 years.⁴⁹

Sectoral employment

Employment (2004)⁵⁰ & GDP share (2013)⁵¹
Sector & Sex distribution – (Graph without Agriculture and Not Classified)

Sector	Male employment	Female employment	GDP share per sector
Mining and quarrying	78,386	12,984	10 %
Manufacturing	216,155	86,890	14 %
Electricity, gas and water	0	0	4.3 %
Construction	76,010	8,739	3.6 %
Trade, restaurants and hotels	118,238	94,131	15 %
Transport and communication	97,388	9,238	13 %
Finance, real estate and business services	31,935	16,479	11 %
Public administration, education & health	177,885	120,597	3.7 %
Other services	31,143	89,387	12 %
Agriculture	1,552,143	1,774,003	13 %



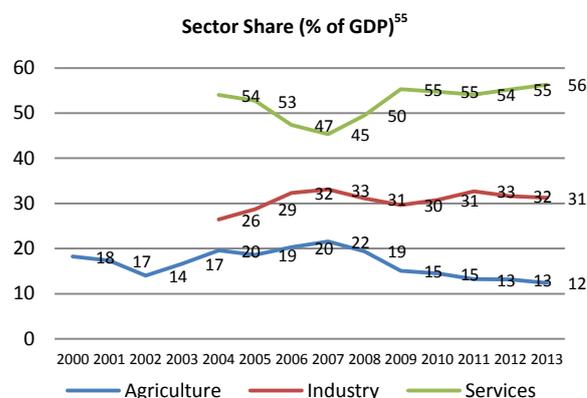
Around 56% of the Zimbabwean population lives in communal lands and resettlement areas; and a further 10% on commercial farms. By contrast only 35% of the population lives in urban areas.

Agriculture absorbs 65% of the employment, which is more or less equal among men and females. It is in line with a national survey from 2011, which demonstrated that three out of five (61%) of all the employed persons were own account worker (communal, resettlement, and peri-urban farmer). These arrangements usually lack social protection and pay is usually too low to generate savings. Furthermore, three out of four (75%) of the employed population are registered as vulnerable employment. More females (83%) have such vulnerable employment in comparison with men (66%).⁵² In addition, around 96% of all agricultural workers hold informal jobs, while in non-agricultural activities the distribution between formal jobs (48%) and informal jobs (52%) is almost even.⁵³

The agricultural sector has been on a decline since 2007. It is likely that the agricultural sector is more productive and more industrialised in Zimbabwe than most other Sub-Saharan African countries. Zimbabwe has had large productions and exports of cash crops. Though the land reforms in the early 2000 decimated

agricultural output, and the farms have since recovered much of their production.⁵⁴ This sector's value added of the GDP has decreased from 20% in 2007 to 14% in 2013. The service sector has been on an increase, reaching 56% of GDP in 2013.

Male dominated industries tend to have higher contributions to GDP relative to employment. Outside agriculture women tend to find work in several sectors, though there are gender segmentations on the labour market these are not as strongly pronounced in Zimbabwe as many other Sub-Saharan African countries.



Migration

Migration		
Net migration (2008-2012)	Zimbabwe	400,000
Net migration to average population per year (2008-2012)	Zimbabwe	1 : 165 inhabitants
	Sub-Saharan Africa	- 1 : 2,835 inhabitants

The flow of the migration in Zimbabwe has changed significantly. The net migration rates in the periods 1998-2002 and 2003-2007 demonstrated some very high net migration rates of -700,000 and -800,000 persons, respectively; i.e. more people left than entering the country. This has now reversed to a positive net migration, i.e. around 400,000 more people enter than leave the country in the period 2008-2012.⁵⁶ The net migration has also been estimated as 1 out of 165 inhabitants.

The top three destinations for migrants are South Africa, the United Kingdom, and Mozambique.⁵⁷

The previous mass migration is mainly due to a long economic recession, where professionals and skilled workers have left the country for better opportunities.⁵⁸ These are also the most entrepreneurial groups of workers, and their

departure has undermined the development of Zimbabwe.

The Reserve Bank of Zimbabwe estimates suggest that Zimbabwe received US\$1.6 billion in remittances during January-November 2013.

The International Organization for Migration has estimated that 1-1.5 million Zimbabwean migrants are living in South Africa, but only 275,000 have applied to be regularized through the Zimbabwe Documentation Process (ZDP), only issued permits to just over half of them. According to refugee rights groups many people are still waiting for their permits. If they do not have the documents, many Zimbabweans are losing jobs or cannot even find jobs in South Africa. The South African's Home Affairs are considering the possibilities of a regional visa system could be introduced, after a 'test run' of the ZDP.⁵⁹

Crop yields have been poor and many farmers have lost their livestock and water sources have dried up. This has forced many people to migrate in search of more green pastures as "environment refugees". The environmental degradation and climate change are among drivers in both forced and voluntary migration.⁶⁰

Informal Economy

Employment in the informal economy		
Share of workers employed in the non-agricultural informal sector	Zimbabwe (2004) ⁶¹	52 %
	Sub-Saharan Africa (2001) ⁶²	78 %

According to the Labour Force Survey 2011, the currently employed population, aged 15 years and above, was estimated to be 5.4 million and of these 84% were considered to be in informal employment. This estimation includes the agricultural sector.⁶³ Based on more outdated data, in terms of share of persons in informal employment in total non-agricultural employment, it was calculated at 52% in 2004. It is estimated that the informal economy contributes to 20% of the country's GDP, which approximately equals US\$1.7 billion.

Females constitute 53% of those in informal employment and 29% of the formally employed. Educational attainment related to the type of employment is estimated at 95% of the informally employed population has secondary or lower levels of education. Around 91% of persons in informal employment are unskilled in their jobs, while more half of persons in formal employment are professionals or skilled. Moreover, paid employees in formal employment on average received higher incomes than their counterparts in informal employment. Hours of work also differ with 57% of persons in informal employment, indicating they had worked less than 40 hours compared to 12% for those in formal employment.⁶⁴ It is common in formal, but especially in informal employment, to have work for few hours a day.⁶⁵

Other estimation show that the number of formal jobs has fallen from about 1.3 million from 1999 to 600,000 in 2009. The dollarization of the economy has made it

increasingly difficult to pay formal wages. Thus, the informal sector is growing, with more workers moving out of the formal sector due to the lack of job creation and security. Informal jobs generally suffer from decent work deficits, with poor safety standards and very low wages.⁶⁶

An ILO survey from 2006 of informally employed in Harare found that they often work excessive hours, though yet generates insufficient income to meet basic needs. Few have social protection. Over a quarter felt represented by ZCTU, but few felt that any organizations represented their needs. No indication was found that workers enter the informal economy as a cost advantage.⁶⁷ One out of two (51%) of the population in the informal sector was youth (15 to 34 years).

Many company closures, retrenchments and the inability of formal structures to absorb the job seekers gave rise to massive expansion of the informal economy. On seeing the continued marginalization of this 'sector', which lacks social protection and income security, a group of 22 informal business associations came together in 2002 to form the Zimbabwe Chamber of Informal Economy Association (ZCIEA). ZCIEA has operated with 150 member associations that are grouped into 45 chapters. Members pay an annual subscription fee. The apex body of the Informal Business Associations is geared to compliment other stakeholders in the government, business (i.e.: EMCOZ) and labour (i.e.: ZCTU) as they seek to improve their access to social services and infrastructure. Membership of ZCIEA has been very high as 1.3 million, but dropped after 2005 due to the government's Operation Restore Order. Slums were demolished and the livelihoods removed for many employed in informal business establishments in the form of shops, markets street vendors etc. Today, ZCIEA has 30,699 members.⁶⁸

Child Labour

Working children			
Proportion of all children in age group			
Region	Year	Type	Proportion
Zimbabwe ⁶⁹ (age 5-14)	2009	Child labourers	13 %
Sub-Saharan Africa ⁷⁰ (age 5-17)	2008	Children in employment	28 %
		Child labourers	25.4 %
		Hazardous work	12.7 %
<i>Children in employment includes all children who conduct some kind of work, whereas child labourers is a narrower term without mild forms of work. Hazardous work is the worst form of child labour as defined in ILO C182.</i>			

Child labor remained endemic and on the rise. In 2009, UNICEF has estimated that 13% of children are engaged in child labour, with 14% for girls and 12% for boys. It defines as work that is harmful to children's physical and mental development and interferes with their schooling. In comparison, the comparably UNICEF estimate of child labour in Sub-Saharan Africa at 33%, while ILO estimates of child labour in this

Gender

Gender - Enterprise Survey ⁷⁴ (2011)	Zimbabwe	Sub-Saharan Africa
Firms with female participation in ownership (%)	56 %	33 %
Firms with a female top manager (%)	18 %	15 %
Proportion of permanent full-time workers that are females (%)	24 %	25 %
Proportion of permanent full-time non-production workers that are females (%)	8.8 %	7.4 %

Zimbabwe enacted the new Constitution under which customary law is no longer exempt from the constitutional protection against nondiscrimination.⁷³ The setting up of the much-awaited Zimbabwe Gender Commission has yet to be constituted, though.

Youth

A revised National Youth Policy was launched in June 2013. Empowerment & participation as well as employment & sustainable livelihoods have been incorporated in the youth policy with diverse strategies.⁷⁶

According to the ILO,⁷⁷ causes and effects of youth unemployment are manifold. There are incompatibility between the curriculum and the needs of the industry in changing times. As a result of this disjuncture,

region is 25%. In both cases the estimate for Zimbabwe's child labour is considerably below the Sub-Saharan average.

Many children work on their own, and most commonly in the industries of agriculture, domestic work, illicit activities, mining, and prostitution.⁷¹ Conditions for children working on farms are particularly difficult as children often are exposed to bad weather, dangerous chemicals and the use of heavy machinery.

The government, ZCTU and EMCOZ are part of a national steering committee on child labour, which is responsible for implementing a national action plan. However, law protection against the worst forms of child labour has poorly been enforced by inspectors who had no special training or resources to address the issue. Instead ZCTU and EMCOZ have adopted their own measures.⁷²

The most recent Enterprise Survey demonstrated that female participation in enterprise ownership is significant higher in comparison with Sub-Saharan Africa trends, while female top management and proportion of women's permanent full-time as well as non-production workers are quite close to each other.

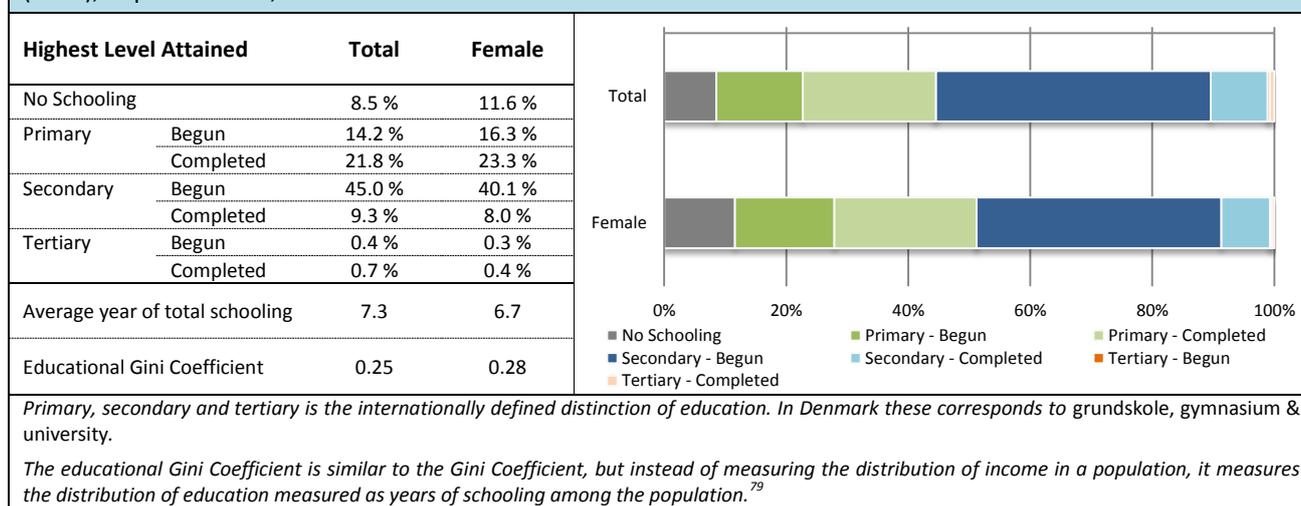
An analysis found that women experience extensive economic discrimination. It include in access to employment, credit, pay, and owning or managing business, and agriculture labor. It is also assessed that three-quarters of women-headed households were "poor" or "very poor" which rendered their work "invisible".⁷⁵

graduates' skills are not relevant to the needs of the communities and nation at large. Furthermore, the shrinking economy cannot absorb all the youth. The effects of high youth unemployment include youth engaging into drug abuse, violence and crime, promiscuity leading to prostitution where they end up contracting HIV and AIDS and other sexually transmitted infections that can be detrimental to their health.

Characteristics of the Working Age Population

Highest level attained and years of schooling in the population⁷⁸

(2010), Population 25+, Total and Female



In Zimbabwe a large majority (83%) of the employed population is unskilled; and has a sex ratio of 92 males per 100 females. It is also a country with a vast young population, i.e. two out five (42%) of the population is below the age of 15 years. About 69% of the population resided in rural areas.⁸⁰

The literacy rate for the country was 97%. A survey shows also that about 29% of the employed population had completed secondary education as their highest level of education, 20% had some secondary education, 18% had completed primary and 17% had some primary education; 11% of the currently employed population had tertiary education. With an average 7.3 years of schooling per capita, Zimbabwe has a very well educated population compared to other Sub-Saharan African countries.

Few Zimbabwean's have no schooling and most have progressed into secondary education, though relatively few have completed secondary education, and very few have tertiary education.

Zimbabwe was once recognised as having one of the best education systems in Africa, and this legacy is likely why educational attainments is high in Zimbabwe.

Women are slightly underrepresented in all types of education, except primary education, where more have begun and completed. The gender difference is

not as pronounced in Zimbabwe as many other Sub-Saharan African countries.

The graph above shows the educational attainment of all Zimbabwean's above 25 years, which gives a glance of the human capital of the labour force.

No data is available for enrolment into primary, secondary or tertiary schools, but attendance rates in primary schools are 90% for boys and 92% for girls, and 45% in secondary schools for both girls and boys, which are all higher than many other Sub-Saharan African countries.⁸¹

The Minister of Education has started far-reaching curriculum and administrative changes which directly affect teachers' professional and social life, and is hated very much. The government made promises to civil servants and teachers are the bulk. It's pay- back time and the government is broke, and has been unable to pay salaries on time, things expected to worsen. However, the Zimbabwe Teachers' Association (ZIMTA) is cautious about the reforms. Among others due to teachers should not be prejudiced or dismissed, and they emphasize that the country has a shortage of educators.

Little data is available on vocational education performances in Zimbabwe. It has been noted, though, that new vocational training for young women and men in rural areas is under development.

Social Protection

Public spending on social protection schemes ⁸² (2011)		
	ZWD	560 million
	US\$	115 million
Public social protection expenditure, excl. health	% of GDP	1.3 %
	per capita	8.6 US\$
	% of government expenditure	5.7 %
Public health care	% of GDP	4.3 %
Health social protection coverage	% of population	1.0 %
Trends in government expenditure in health	% changes per year (2007-2011)	N/A

Benefits, coverage and contributions to pension schemes ⁸³ (2006-2009)		
Social benefits for the active age	% of GDP	0.05 %
Pensionable age receiving an old age pension (age 60+)	Proportion of total	6.2 %
Economically active population contributing to a pension scheme	Per cent	56 %
Active contributors to a pension scheme	15-64 years	17 %

Zimbabwe has an insufficient coverage of social protection schemes, which is a mirror image of the dominance of the informal economy in the country. It has been estimated that 1% of the population is covered by health social protection, which is one of the lowest rates in Africa. In terms of public social protection expenditure, excluding health; is also quite low at 1.3% of GDP.

The main employment related social protection scheme is the National Pension Scheme (NPS). It is fully contributory with employees and employers each paying 4% of the salary. Self-employed and informal workers cannot join.⁸⁴

In 2010, the National Social Security Authority (NSSA) reported 1,248,060 active contributors in the NPS, equivalent at 20% of the labour force, which is a high coverage for a Sub-Saharan Africa country. Investment income to the NPS was affected by the hyperinflation ending in 2009.⁸⁵ Corruption in the pension authority is also taking its toll on the pension scheme.⁸⁶

Occupational injuries are covered for all formal employed workers through the Workers' Compensation Insurance Scheme (WCIS). Employers

pay the full cost through insurance premiums based on monthly earnings.⁸⁷

The size of the informal economy, social protection interventions have been largely inadequate and policies have also not been targeted at the non-formal economy. According to the Demographic Health Survey 2010-11, 93% of Zimbabwean women and 91% of men do actually not have medical insurance or other employer plans. In general, the social protection area has been underfunded and social protection strategy has been missing.⁸⁸

Zimbabwe's health sector is divided into public and private sectors. Government operates with 70% of health facilities in the country, while the private sector owns about 30%. Most workers in the country cannot afford private hospitals and clinics. Instead they are receiving cheaper services from state and mission hospitals and clinics. It is also noticeably that only 8% of the total population is covered by medical aid schemes, and close to seven out of ten (68%), who are not receiving any social security funds, come from the rural areas.

There is mistrust for the social protection systems. Workers in the formal sector are already highly taxed employees, which can be considered as a minority to help finance government operations. Among others, it is observed that social security contributions increased from 6% of salary in 2005 to 8% in 2010.⁸⁹ The Government has suggested to introducing a new compulsory National Health Insurance Fund as a levy to finance health care. However, funds have come under fire for investments and allegations of corruption. The ZCTU will resist any new compulsory levies on employees until issues to do with the management of the fund are thoroughly interrogated and agreed on by contributors.⁹⁰

The AIDS levy - 3% tax on income - has become a proposed source of funding. There has been an increase in revenue collected in the past years, US\$20.5 million in 2010 to an at least estimated US\$30 million in 2013. Although 347,000 people are on antiretroviral treatment in the country, another 600,000 need the medication. The AIDS levy contributed almost a quarter of the funds to purchase anti-retroviral medicine, while 76% of the treatment program was financed by international donors.⁹¹

General Economic Performance

Key Facts ⁹² (2013 est.)				
GDP (US\$)	GDP per capita (PPP)	GDP real growth	Human Development Index (2012) ⁹³	Gini Index (2006)
10.5 billion	600 US\$ 227 of 228 countries	3.2 %	0.397 172 of 187 countries	50.1 21 of 141 countries
<i>In terms of the Gini Index, the first country has the highest inequality, while the number 136 has the highest equality.</i>				

Doing business ⁹⁴	Control of corruption	Government effectiveness	Rule of law
171 of 189 countries	-1.31 (2010) -1.27 (2012)	-1.50 (2010) -1.21 (2012)	-1.81 (2010) -1.62 (2012)

A low ranking on the Ease of Doing Business Index means the regulatory environment is more conducive to the start-up and operation of a local firm.⁹⁵

The selected Governance Indicators cover the years 2010 and 2012 and ranging from -2.5 to 2.5; i.e. negative tendencies below the zero mean and unit standard deviation, score negative measurements.⁹⁶

Zimbabwe has experienced progress in stabilizing the economy since the end of hyperinflation in 2009, which reached over millions of percentage per month. The GDP has grown by around 3.2% in 2013 and estimated to increase 5%-6% in 2014-2015.⁹⁷ The recovery of the economy remains fragile, though.⁹⁸

The sharp drop of GDP per capita (in purchasing power parity) in 2001 from US\$800 to US\$300 in 2004, it is now rebounding and reached US\$600 in 2013. It is very low in contrast with the Sub-Saharan Africa's average and the forecast suggests a relative lower growth.

The inflation has remained in the low single digits, mainly due to the multi-currency system. Government revenues have more than doubled from 16% of GDP in 2009 to an estimated 36% of GDP in 2012, allowing the restoration of basic public services.⁹⁹

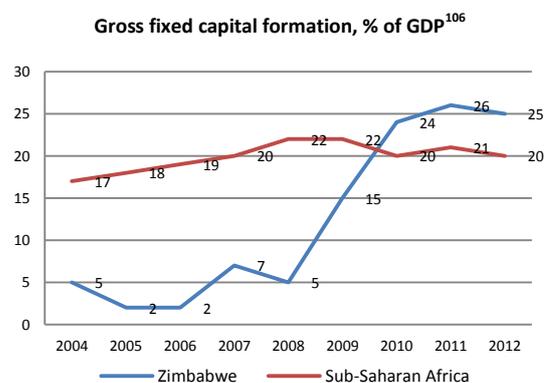
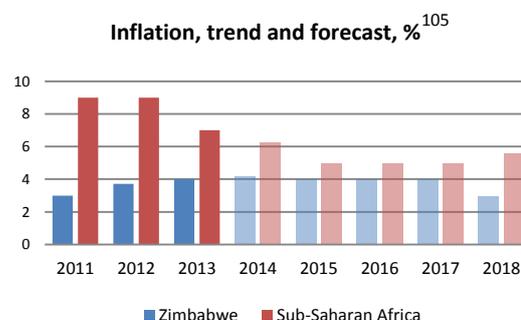
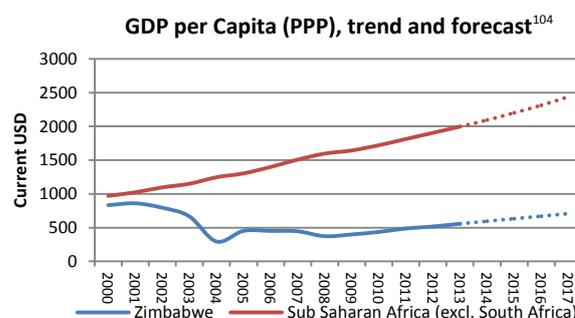
The gross fixed capital formation has also been unstable and very low in comparison with the Sub-Saharan Africa trend.¹⁰⁰ However, it has in recent years been increased significantly and is now above the Sub-Saharan Africa's average.

Based on the Doing Business Index, which ranking on the ease of doing business, has showed that the country has a very low ranking as 171 out of 189 countries, and stepped down on one step on the ranking since 2013/14.¹⁰¹ Both Starting a Business, Trading Across Borders and Dealing with Construction

Permits have the lowest rankings. Although there have been some improvements on Getting Credit, a sector such as manufacturing remains stunted by tightening credit conditions, subdued investment and declining competitiveness.

Also on the selected Governance Indicators, the country has extremely low rankings, but has some slight improvements.¹⁰²

The country has reached a one step up on the latter of the Human Development Index from 172 in 2011 to 172 in 2012. Covering the period 2007-2012, the change is status quo and remains low.¹⁰³ The Gini Index shows a quite unequal distribution of family income.



Trade

Trade and Foreign Direct Investment ¹⁰⁷ 2013 (est.)			
Exports	Imports	FDI flow ¹⁰⁸ (average 2008-2012)	FDI Stock
3.1 billion US\$ 30 % of GDP	4.6 billion US\$ 44 % of GDP	222 million US\$ 2.1 % of GDP	N/A

Imports and exports play a large role in the economy. The trade balance is still in favour of import and there is a deficit on US\$1.3 billion. Zimbabwe's export economy is principally geared on agriculture and mining. Export accumulated an additional US\$400 million since 2011, reaching US\$3.1 billion in 2013. Especially the export to South Africa is up with 6%.¹⁰⁹

Mining is an important economic sector for the country and during 2014 there are very tough pay negotiations between the Chamber of Mines and the Associated Mine Workers Union of Zimbabwe.¹¹⁰

The foreign trade has been hampered by political instability, low government effectiveness, difficulties of doing business, and western economic sanctions. Uncertainty about the current political stability in the country is also a visible deterrent on investment. Economic sanctions, mainly from western countries, have led Zimbabwe to open up for Chinese investment and now Chinese control up to 80% of mines and manufacture.

Trade agreements

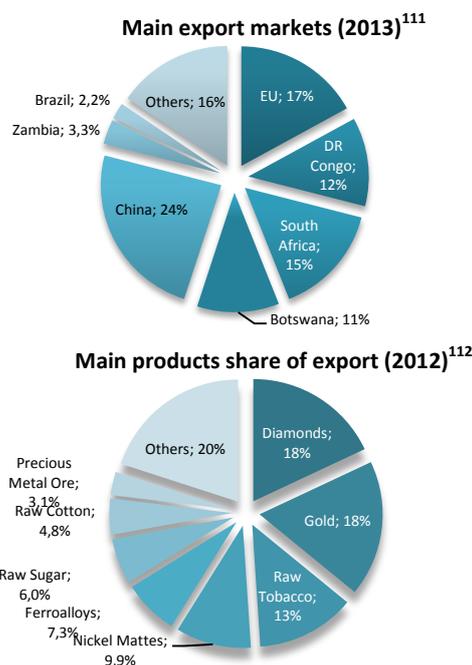
Zimbabwe has currently five preferential bilateral trade agreements under which exporters can benefit. These are: Botswana, Namibia, Malawi; South Africa, and Mozambique. Currently the Government reviews the agreements, particularly South Africa. There are concerns that some third party products from that country are entering Zimbabwe under the guise of the Southern Africa Development Community (SADC) rules of origin.

Both India and Russia boycotted a major international trade fair in Zimbabwe in 2012 in protest against the country's indigenization policy of taking control of foreign companies.

Zimbabwe has benefitted by the interim Economic Partnership Agreement between the EU and Eastern

and Southern African states. There has been a growth on trade in Zimbabwe's favor on approximately US\$200 million.

Zimbabwe is one of the few Sub-Saharan African countries, which the United States has not declared eligible for the African Growth and Opportunity Act (AGOA).



Export Processing Zones

Special economic zones were originally set up in 1987. But the operations were closed after the inception of Zimbabwe Investment Authority and the collapse of the economy. The government intends to re-establish special economic zones to boost the ailing manufacturing industry. And there has been an inflow again of industry attracted foreign investors. However, the controversial indigenization policy, which requires foreign businesses valued over US\$50,000 to cede 51% of the share-holding of their Zimbabwean operations to black Zimbabweans, has been criticized and potentially affect Chinese, Congolese, Indians, Pakistanis and Nigerians. ZFTU recently gave Nigerians operating business in Bulawayo an ultimatum to vacate the city, claiming that foreigners were not paying wages and taxes.¹¹³

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