




ULANDSSEKRETARIATET – DTDA
DANISH TRADE UNION DEVELOPMENT AGENCY



LABOUR MARKET PROFILE

2015

ZIMBABWE



DTDA's Analytical Unit
Copenhagen, Denmark



PREFACE

The Danish Trade Union Development Agency (DTDA) presents this Labour Market Profile as a yearly updated report that provides an overview of the labour market's situation.

This country profile presents the recent main developments and is not an in-depth analysis. Nevertheless, it shows a wide range of data in a reader-friendly style. Certain key findings of this report can be found on the Executive Summary.

The report is divided in 11 thematic sections, which includes trade unions, employers' organizations, tripartite structures, national labour legislation, violations of trade union rights, working conditions, situation of the workforce (with subsections such as unemployment, sectoral employment, migration, informal economy, child labour, gender, and youth), education (with subsection vocational training), social protection, general economic performance, and trade. Additionally, the reader may find, an appendix including a list of the ratified ILO Conventions.

As indicated, the report is driven by statistical data selection from international databanks, surveys and reports (e.g. the International Labour Organization (ILO), the International Trade Union Confederation (ITUC), the World Bank, WageIndicator Foundation, the Africa Labour Research & Educational Institute (ALREI), etc.) as well as national statistical institutions and ministries, and others. Moreover, narrative inputs are collected from international news sources (e.g. The Economist, the British Broadcasting Corporation (BBC), LabourStart, The Guardian, etc.) together with local sources such as trade unions centers, NGOs, local news, the DTDA's Sub-Regional Office, among others.

This report also collects references from several indexes, e.g. Global Rights Index, Doing Business Index, the

Governance Indicators, and the Human Development Index. The indexes' methodologies and the data quality can be followed by the sources websites.

All sources, indicators and/or narrative inputs that are used are available by links through footnotes.

It is noteworthy to highlight that although most of the statistical data is available, there were some problems with availability and reliability of the data. In particular, the data collection of trade union membership, Collective Bargaining Agreements (CBAs), women's trade union membership and occupational health and safety (OHS) committees are a challenge. Therefore, used data from these abovementioned indicators should be interpreted with some reservations.

ACKNOWLEDGMENT

This Labour Market Profile is prepared by the DTDA's Analytical Unit in Copenhagen with support from our sub-Regional Office in Mozambique as well as our local partners in terms of data collection of trade union membership.

All other labour market profiles of the countries where DTDA operates are available at our website: <http://www.ulandssekretariatet.dk/content/landeanalyse>

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Zimbabwe

Labour Market Profile

EXECUTIVE SUMMARY

Zimbabwe's downward spiral of the economy has been long attributed to their corrupted and mismanaged government coupled with the eviction of thousands of farmers in the late 1990's. Such events represented a state of hyperinflation. Since, 2009, the Zimbabwean economy has been on the rebound and inflation has remained in low single digits. Furthermore, a deep gap in their trade balance persists and has been associated with the import of consumption goods that overpowers their national production. It is uneasy to doing business in Zimbabwe since the governance environment is very weak.

Due to the 2000's economic turmoil, the amount working poor has increased. Though a brain drain net migration increased many are now starting to return to Zimbabwe. Also, while employment in the formal sector and contributing family workers significantly declined, own account workers in contrast increased. This is a clear indication that the working conditions deteriorated and activities in the informal economy increased.

The minimum wage system collapsed in the 2000s and became dollarized in 2009. Today, most sectoral minimum wages are lying significantly below the national Poverty Datum Line. In practice, the minimum wage standards are not enforced effectively. Those who receive mean (real) earnings are experiencing a downward trend. And the population is confronting high consumption prices. Workers from the informal economy, which covers 84 percent of the workforce, confront extremely low incomes, poor working conditions, and an inadequate worker's protection. Moreover, the enforcement of the work hour's law has not been effective due to weak monitoring systems and a labour inspector shortage.

The new constitution from 2013 has been considered as a "new path" that outlines rights of equal pay for equal work, fair wage, right to collective bargaining, and strike for all workers, except for security forces. Also a new Labour Amendment Act from August 2015 was launched. Reforms are expected to change the structure of the

labour market. There have been registered flaws of the legislation and workers affected by no guarantee of rights.

Compare to the sub-Saharan Africa average, Zimbabwe has a relatively high unemployment rate. Not to mention a more 'structural' unemployment is estimated extremely high at 80 percent, which is a signal of a huge employment deficit in the formal sector. Actually Zimbabwean workers within the formal sector are considered a minority group that pays income taxes and whom automatically form part of the country's social security system. For example, only 8 percent of the population is a member of a medical aid scheme. Nevertheless, a new compulsory National Health Insurance Fund initiative is currently under consideration but not yet approved.

Zimbabwe's education system deteriorated and broke down during the 2000s. However, it appears it is returning to its previous high enrolment rates. Remarkably, there is a 97 percent of Zimbabwean literacy rate. But only 29 percent of them have completed a secondary education. In reality, it has been estimated that 83 percent of the employed population is unskilled in Zimbabwe.

Zimbabwe experienced a fractionalization of Zimbabwe Congress of Trade Unions (ZCTU) and political strains elevated by the government-created Zimbabwe Federation of Trade Unions (ZFTU). The trade union movement has faced a decline in membership, related to lost jobs in the formal economy. By the same token many workers had their union fees deducted from their salaries, even though employers did not dispatch it to the unions. The Zimbabwe Chamber of Informal Economy Association (ZCIEA) membership was dramatically reduced due to the government's Operation Restore Order from 2005. Albeit tripartite social dialogue has been ineffective to reach meaningful consultation on social and economic policies, there are openings to improve the situation.



COUNTRY MAP



Source: The CIA World Factbook



TABLE OF CONTENTS

PREFACE	II
ACKNOWLEDGMENT	II
EXECUTIVE SUMMARY	III
COUNTRY MAP	IV
TRADE UNIONS	1
EMPLOYERS' ORGANISATIONS	2
Employers' Confederation of Zimbabwe (EMCOZ).....	2
CENTRAL TRIPARTITE STRUCTURES	3
Tripartite Negotiation Forum (TNF)	3
NATIONAL LABOUR LEGISLATION	3
TRADE UNION VIOLATION RIGHTS	5
WORKING CONDITIONS	6
WORKFORCE	7
Unemployment	8
Sectoral Employment.....	9
Migration	10
Informal Economy	11
Child Labour.....	11
Gender	12
Youth	13
EDUCATION	14
SOCIAL PROTECTION	15
GENERAL ECONOMIC PERFORMANCE	16
TRADE	18
Trade Agreements	19
Special Economic Zones (SEZ).....	20
APPENDIX: ADDITIONAL DATA	20
Trade Unions in Zimbabwe	20
Ratified ILO Conventions	22
REFERENCES	23



Tables

Table 1: Trade unions and Collective Bargaining Agreements (CBAs) in Zimbabwe	1
Table 2: Trade Union Centre in Zimbabwe, 2013 (est.)	1
Table 3: Zimbabwe: Global Rights Index 2015	5
Table 4: ILO Complaints Procedure	5
Table 5: Wages and earnings Monthly average and legal minimum wages	6
Table 6: Working Conditions in Zimbabwe	7
Table 7: Employment rates, 2013	7
Table 8: Comparative average growth of GDP per capita, employment and working age population in Zimbabwe	8
Table 9: Employment (2004) & GDP share (2013)	9
Table 10: Migration Facts	10
Table 11: Employment in the informal economy	11
Table 12: Working children	12
Table 13: Gender Enterprise Survey, 2011	12
Table 14: Public spending on social protection schemes, 2011	15
Table 15: Benefits, coverage and contributions to pension schemes (2006-2010)	15
Table 16: General Economic Performance Key Facts, 2014	16
Table 17: Zimbabwe's Doing Business	18
Table 18: Zimbabwe's Governance Indicators, 2009-2014	18
Table 19: Trade and Foreign Direct Investment (2014 est.)	18
Table 20: Trade Unions in Zimbabwe	20
Table 21: Ratified ILO Conventions	22

Figures

Figure 1: Mean nominal monthly earnings, US\$ and %, 2010-2012	6
Figure 2: Participation and inactivity rates, 1991-2013	7
Figure 3: Labour productivity, 2006-2015	8
Figure 4: Unemployment rates in Zimbabwe and the sub-Saharan Africa (SSA), 2000-2015, %	8
Figure 5: Status in employment in Zimbabwe, 1999-2012, %	10
Figure 6: Zimbabwe's Sectors Share (% of GDP)	10
Figure 7: Zimbabwe's youth unemployment trend, 1991-2013, %	13
Figure 8: School Levels and Enrolment (%), 2000-2012	14
Figure 9: GDP per capita growth, 2000-2014	16
Figure 10: GDP per capita (PPP) trend and forecast	17
Figure 11: Working poor	17
Figure 12: Inflation trend and forecast (%)	17
Figure 13: Gross Fixed Capital Formation, % of GDP	17
Figure 14: Trade and Foreign Direct Investment (FDI), 2000-2014	19
Figure 15: Main export markets (2013)	19
Figure 16: Main products share of export (2012)	19



TRADE UNIONS

It has been registered that the government does not respect the worker rights to form or join unions, strike, and bargain collectively. There has also been government interference with trade union activity, e.g. public authorities withhold the registration certificate for a number of unions.¹

The private sector workers' rights are covered by regulations to form and join unions, conduct legal strikes, and bargain collectively. Workers from the public sector are governed by other regulations. Workers in the public sector are not allowed to form and join trade unions. Instead they may form associations that can bargain collectively and strike without notice.² Especially the right to strike is strictly regulated.

Equally important the labour legislation encourages the creation of workers' committees in enterprises where less than 50 percent 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, such as wages. According to the U.S. Annual Country Reports on Human Rights Practices, these parallel bodies have been regarded by trade unions as an arrangement that employers could potentially use to undermine the role of the unions.

What has often been observed is that thousands of workers' union fees deducted from their salaries were not remitted by employers to the unions. This affected the operations of the Zimbabwe Congress of Trade Unions (ZCTU) as most unions are finding it difficult to pay their subscriptions.³ This has also brought unions into financial difficulties.⁴

Estimates show that 2.5 percent of the labour force are trade union members with a women participation rate at 29 percent (Table 1). Women's participation is particularly exhibited in banks, domestic workers and the teacher association sectors.

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

function and around 5 percent of the workforce are covered by agreements. This ministry has the power to veto the agreement. It has been noted that workers and employers at the enterprise level also can come to a binding agreement outside of the official framework.

Table 1: Trade unions and Collective Bargaining Agreements (CBAs) in Zimbabwe⁵

Number of trade unions	36
Dues (standard; per member) (ZCTU)	35 cents
Members of trade unions (federations)	177,284
Trade union members share of labour force	2.5 %
Trade union members share to waged workers	7.2 %
Women's 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 (2015 est.)	7,509,000

Domestic workers are unionized and are protected by labor laws.⁶

During 2015 a range of issues affecting workers, including the decision to freeze and cut salaries, introduce labour market flexibility, the non or late payment of workers' salaries, and the failure to pass on membership subscriptions to the unions.⁷ As a result the trade union base is likely to decreasing. The failure to remit dues by some employers has debilitated the ability of the unions to represent effectively the workers in most sectors.

Based on gathered data, a total 36 trade union are operating in Zimbabwe with at least 177,000 members (Table 1). ZCTU is the main trade union centre (Table 2). More information of the trade unions' status is available on Table 20.

Table 2: Trade Union Centre in Zimbabwe, 2013 (est.)⁸

Trade Centre	Union	Total Members	Women Members	No. of CBAs
ZCTU		156,285	44,854	42
NFTU		12,000	-	-
ZFTU		-	-	-



Zimbabwe Congress of Trade Unions (ZCTU)⁹

The Zimbabwe Congress of Trade Unions (ZCTU) was founded in 1981 and formally consists of 25 affiliated trade unions per 2014.¹⁰ The ZCTU has structures at national, regional and district levels, and affiliated to the International Trade Union Confederation (ITUC).

ZCTU has played an active political role in the democratic development of Zimbabwe.¹¹ It used to be close to the ZANU-PF ruling party, but turned increasingly away due to a perceived growing authoritative and corruption. ZCTU was a leading force behind the creation of the opposition party Movement for Democratic Change (MDC), whose leader Morgan Tsvangirai has a history as General Secretary of ZCTU. According to the Friederich Ebert Stiftung,¹² ZCTU has close ties to the MDC party.

ZCTU has experienced fractionalization after 2011. The legitimacy of the 7th Congress was challenged by the 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.¹³ It is also important to note that out of the seven unions that were disaffiliated there have also been some breakaway groups. They have formed new unions which have already applied to re-join ZCTU as new unions. Some of these unions, if not all, have taken more than 80 percent of the members away from the old leaders who were fighting the legitimacy of the August 2011 new leadership.¹⁴ It is estimated that the ZCTU membership decreased 5.8 percent in the period 2010/11 to 2013. This is a result of factionalism and job losses due to the economic downturn.

ZCTU congress was held in December 2014. The former Deputy Secretary General, Mr. Comas Mukuka, was elected as the new Secretary General. Mr. Mukuka comes from the public sector teachers' union.

ZCTU has promoted solidarity within the expansive informal economy, facilitating the empowerment of workers in this segment. Among others, Zimbabwe Apex of Informal Economy Associations (ZCIEA) - a national alliance of membership-based organizations - was formed with the assistance of ZCTU. ZCTU has opened their view on the management of the transitioning from the informal to the formal economy, which is a part of a campaign from ILO.

Zimbabwe Federation of Trade Unions (ZFTU)

The Zimbabwe Federation of Trade Unions (ZFTU) also exists, which is a government-created alternative trade union federation. There has been argued that it undermines the political influence of the trade union movement. However, it did not wield real influence over labour negotiations, and was rarely included in labour related discussions with employers' and workers' organizations.¹⁵

ZFTU is an umbrella trade union in their own right because they are registered as such under the Zimbabwean laws. And according to the ZFTU's Facebook profile, the organization has over 40 affiliates. 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 through ZFTU. Therefore, ZFTU does not have well established affiliates. Usually ZFTU is mentioned when some national programs have government involvement.¹⁶

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

EMPLOYERS' ORGANISATIONS

Employers' Confederation of Zimbabwe (EMCOZ)¹⁷

EMCOZ was formed in 1980. The 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. The organization arranges training seminars; negotiates in industrial disputes and represents employers in tripartite committees as the equal partner of ZCTU.

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

The organization is the current chair and secretariat of the Business Council of Zimbabwe. EMCOZ is also a member



of the International Organisation of Employers (IOE) and the Pan-African Employers' Confederation (PEC). PEC has an observer status at the African Union and the ILO.

The confederation is supporting Companies in Implementing Workplace HIV and AIDS programs. In addition, EMCOZ contributes to the Skills for Youth Employment and Rural Development Program in collaboration with ZCTU and the Government

CENTRAL TRIPARTITE STRUCTURES

Mediation and Arbitration

Industrial disputes are sent to a labour officer. If a 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.

Although the labour court handles complaints of antiunion discrimination, and may direct that workers fired due to such discrimination be reinstated, a recent study concluded that the arbitration system in Zimbabwe has been largely ineffective. This has mainly been due to challenges around arbitrator costs, complex procedural technicalities and the perceived lack of integrity of the arbitrators.¹⁸

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.

National Employment Councils (NECs)

The NECs are representative bodies of employer and employee organizations, i.e. made up of four structures: the Council, the Executive Committee, the Negotiating Committee, and the Local Joint Committee. Central to these structures are Designated Agents (DA) and Arbitrators who are responsible for resolving disputes in terms of the Labour Act. Thus, industry level bargaining takes place within the framework of the NEC. Among others, the NECs negotiate the minimum wage for all industrial sectors through a bipartite agreement between employers and labor unions.

Tripartite Negotiation Forum (TNF)

The Tripartite Negotiating Forum (TNF) was established in 2001 for workers, employers, and the government to tackle macro-social issues. These talks have been unproductive since their inception, which was related to a lack of a legal framework. It has also been noted that a continuing impasse for the TNF has been disagreement between employers and workers over indexing wages to a measure of poverty.

The Kadoma Declaration and the Founding Principle of the TNF of national dialogue were signed in September 2009.¹⁹ There were also efforts underway to institutionalize dialogue under TNF by making it a legislative body with an independent secretariat. It has stayed stalled in several years, but during 2015 the legislation has been put on the table again.

Other bi/tripartite organs

- National Social Security Authority
- Health Insurance Scheme
- Retrenchment Board
- Zimbabwe Occupational Health and Safety Council
- National Manpower Advisory Council
- National Disability Board
- National Steering Committee on Decent Work Agenda
- Public Service Commission (PSC)
- Zimbabwe National Chamber of Commerce (ZNCC)
- Confederation of Zimbabwe Industries (CZI)
- Zimbabwe Investment Authority (ZIA)
- National Economic Consultative Forum (NECF)
- Zimbabwe Chamber of Mines (ZCM)
- Zimbabwe Institute of Engineers (ZIE)
- Teachers Associations
- Health Services Board
- Association of Employment Agencies
- Association of Local Authorities
- Research Council of Zimbabwe (RCZ)

NATIONAL LABOUR LEGISLATION

Constitution

The former constitution from 1979²⁰ was amended several times. A negotiated proposed constitution was launched in 2008 after a constitutional outreach program. This new constitution was approved by referendum in



2013. Some of the new constitution's clauses do not take effect for 10 years, though.

Both the former 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 Act²¹

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 the Advisory Council and minimum wage setting, the Workers Committees, the Employment Councils, the Labour Court, and the Employment Agencies.

The Labour Law has been under review since the Government of National Unity (GNU) and the government is proposing Labour Market Flexibility. The trade union movement identified a wide range of critical issues affecting workers. This includes the decision to freeze and cut salaries, introduce labour market flexibility, the non or late payment of workers' salaries, the failure to pass on membership subscriptions to the unions, and all contrary to existing collective agreements.²²

Also the employers came out strongly against the Labour Amendment Act. They argued that dismissal of workers on three months' notice could worsen the business environment and losing jobs. According to the EMCOZ, their contributions to the draft act did not taken into consideration and undermining the tripartite negotiations.²³

In August 2015, President Mugabe signed into law the Labour Amendment Act, following its passing in Parliament. According to an analysis the amendments are likely to drastically changing the structure of the labour act.²⁴

It is still too early to measure the impact of the new Act. Nonetheless, based on a landmark ruling by the Supreme Court in July 2015, companies can lawfully terminate contracts at any time without offering a package, provided they are at least three months' notice. This has been interpreted as a minimum retrenchment package. Stated differently, it became easier of firing workers. As an aftermath of the ruling, over 25,000 jobs were lost within a month. In the light of the impact, the government amended the Labour Act with a minimum retrenchment package of two weeks' salary for every year worked. The EMCOZ has been critical of this retrospective clause.

Factories and Works Act²⁵

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.²⁶

Other legislations exists which regulates and sets standards and restrictions for the labour market.²⁷ Ratified ILO Conventions are also available by Table 21.

The ITUC has registered many flaws on the legislation to guarantee workers' rights. Some examples are: i) restrictions on the right to freely organize activities and formulate programs; administrative authorities' power to unilaterally dissolve, suspend or de-register trade union organizations; ii) authorities' or employers' power to unilaterally annul, modify or extend content and scope of collective agreements; and iii) excessive civil or penal sanctions for workers and unions involved in non-authorized strike actions.²⁸



The U.S. 2014 Annual Country Reports on Human Rights Practices also registered many weaknesses of the legislation (see also the Trade Union section). For example, the Ministry of Public Service, Labor, and Social Welfare is not effectively enforcing laws. Likewise, the government does not respect the worker rights to form or join unions, strike, and bargain collectively. Government interference with trade union activity is common. Although the law does not require unions to inform the police of public gatherings, the authorities often deny permission to unions that applied and/or uses force to suppress strikes.

TRADE UNION VIOLATION RIGHTS

The International Trade Union Confederation (ITUC) has classified Zimbabwe as a country with 'no guarantee of rights', i.e. rating at 5 out of 5+ on the Global Rights Index (see below).

Table 3: Zimbabwe: Global Rights Index 2015²⁹

5 out of 5+	<ul style="list-style-type: none"> ○ No guarantee of rights ○ Countries with the rating of 5 are the worst countries in the world to work in. While the legislation may spell out certain rights workers have effectively no access to these rights and are therefore exposed to autocratic regimes and unfair labour practices.
<p><i>Note: Five clusters in total with ratings from 1 to 5. A country is assigned the rating 5+ by default, if the rule of law has completely broken down.</i></p>	

In the period 2015 ITUC registered three cases of no guarantee of rights.³⁰ The first was related to 850 workers from a company who withdrew their membership from a trade union and formed a new union centre in 2012. Although the registration was formally registered, the original union opposed this registration. In January 2015, the registrar ended up denying the registration on the grounds that the union only represented a minority of workers. This case was filed by the new trade union in February 2015 as a complaint with the Labour Court.

Secondly, there was registered in June 2015 that the political party, ZANU-PF, attempted to intimidate ZCTU members during the nation-wide demonstration in Bulawayo and Gweru and distributed flyers which claimed that the protests had been cancelled with false signatures.

Thirdly, in February 2015, a teacher union was not permitted to hold a march on the Global Day of Action for the Right to Strike called by the ITUC. It was noted that police blocked the march demanding the union to produce a clearance letter from the Public Service Commission, provide details of the marchers and registration numbers of vehicles to be used. The union had notified police about the march seven days in advance.

The U.S. Annual Country Reports on Human Rights Practices has also registered several trade union rights violations in 2014.³¹ This includes that employers frequently abused institutional weakness by creating a deadlock in bargaining processes. This was related to forcing the referral of the dispute to arbitration and then to court, forestalling a decision in a reasonable timeframe. As an example the Motor Vehicle Manufacturers Employers Association refused to bargain in good faith and no collective agreement had been reached since 2007.

Some agricultural workers have reported verbal and physical attacks by employers during negotiations. Not to mention antiunion discrimination has been prevalent in state-owned enterprises. For example in April 2014 the government-owned Agricultural Bank of Zimbabwe refused to allow a member of a trade union and young workers delegate, to attend an international unions' conference and training course.

Zimbabwe has one active Freedom of Association confidently case in the ILO which was filed by ZCTU and ITUC in April 2015. There are 11 closed cases (Table 4).

Table 4: ILO Complaints Procedure³²

Zimbabwe: Status of Freedom of Association cases, 2015	
Active	1
Follow-up	0
Closed	11



WORKING CONDITIONS

The minimum wages were ranging from US\$170 (sugar milling) to US\$579 (air transport) in 2014-2015 (Table 5). The 2015 (January) Poverty Datum Line, which measures sufficient income earnings to support the minimum food requirement for a family of five, estimated US\$500.³³ Except the air transport sector's minimum wage, all other sectors' minimum wages (e.g. manufacturing, mining, catering, and tourism) are significantly below this line. In the same fashion many public servants also earn less than the poverty line. Also with reference to the labor force survey 2011, only 42 percent of workers earned an income sufficient to support the minimum food requirement for a family of five.

Several of the NECs abandoned wage negotiations during 2015 with their employers due to acute financial difficulties faced by the sectors, business digest has established.

Table 5: Wages and earnings Monthly average and legal minimum wages

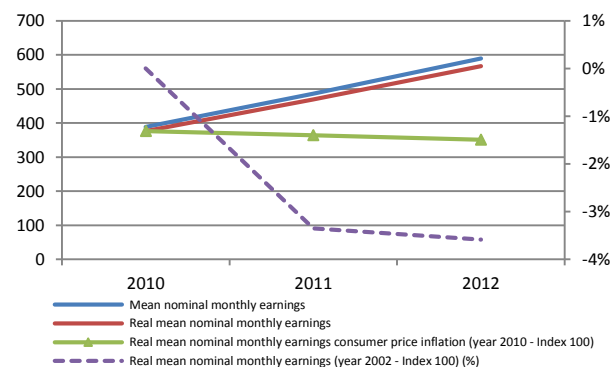
	Source	US\$
Mean nominal monthly earnings (2012)	ILOSTAT ³⁴	589
Minimum wage Highest (2014/15)		579
Minimum wage Lowest (2014/15)	Wage Indicator ³⁵	170
Minimum wages for domestic workers (2014/15)		85-100
Ratio of minimum wage to value added per worker (2014)	Doing Business ³⁶	2.12
<i>Ratio of minimum 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.³⁷</i>		

The agricultural sector has the lowest wages. This is likely because industrialised farms are more common to subsistence farming in Zimbabwe, and they are recovering from the land reforms in the early 2000s.³⁸

The Ministry of Public Service, Labor, and Social Welfare is enforcing the minimum wage and work hours law. However, the standards are not enforced effectively. This is most often related to ineffective monitoring systems and a labor inspector shortage.³⁹

It is noteworthy that the mean monthly earnings are increasing significantly in nominal terms, but when an indexed inflation of consumer prices is brought into the equation it demonstrates a decline of the real mean earnings (Figure 1).

Figure 1: Mean nominal monthly earnings, US\$ and %, 2010-2012⁴⁰



Based on a ITUC Pay Gap Report from 2009, women are underpaid compared to men. This is regardless of their qualification or position in places of work. Stated differently, women are still getting lower salaries than men with the same job responsibilities.

The number of accidents at work in Zimbabwe that result in deaths or serious injuries is high. During 2013 the National Social Security Authority had recorded 53 deaths and 2,931 serious injuries, which was significant higher than 2012. Most of the fatalities and injuries were recorded in the transport and mining sectors.

The HIV prevalence rate was estimated at 15 percent in 2013, yet its prevalence got reduced from a 27 percent rate of 1998.⁴¹ 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.

A wide range of economic sanctions during the 2000s-ongoing, mainly from western countries, led Zimbabwe to open up for Chinese investment. As a result, Chinese businesses control a nearly 80 percent of mines and manufactories in the country. At the same time, Chinese controlled workplaces have a reputation of worse working conditions.⁴²

There were approximately 125 labor inspectors responsible for investigating labor-related violations and



for enforcing labor laws, including those covering children. It equals one inspector per 60,000 workers in the labour force. However, these services are under-resourced and ILO recommends one inspector per 40,000 workers in less developed countries.⁴³

The Zimbabwe Occupational Safety Council regulates working conditions. This institution has been assessed as largely ineffective which is related to financial constraints and staffing shortages. Its status as an advisory council has also been noted as weak.⁴⁴ Generally, workers - both from the formal sector and the informal economy - have poor health and safety standards in the workplace which is related to lack of enforcement of regulations as well as insufficient knowledge.

There is a little or no enforcement of the work hour's law, particularly in agricultural and domestic worker sectors. Among others, this law does not provide for a standard workweek or overtime limit, but it does prescribe a minimum of one 24-hour continuous rest period a week. See more information below (Table 6).

Table 6: Working Conditions in Zimbabwe⁴⁵

Normal weekly hours limit	No universal national limit
Overtime limit	No universal national limit
Maximum weekly hours limit	No universal national limit
Minimum mandatory overtime premium/time off in lieu of overtime wages	No universal national entitlement
Minimum annual leave	21 days
Duration of Maternity Leave	98 days
Amount of maternity leave benefits	100%
Source of maternity leave benefits	Employer

WORKFORCE

Zimbabwe has a total population of 14.1 million people out of which 7.5 million constitute the labour force. A total 82 percent of the country's working-age population are engages actively in the labour market, either by working or looking for work. This is close to the sub-Saharan Africa's average that was estimated at 80 percent. There

are some gaps between men and women on all levels in Zimbabwe (Table 7).

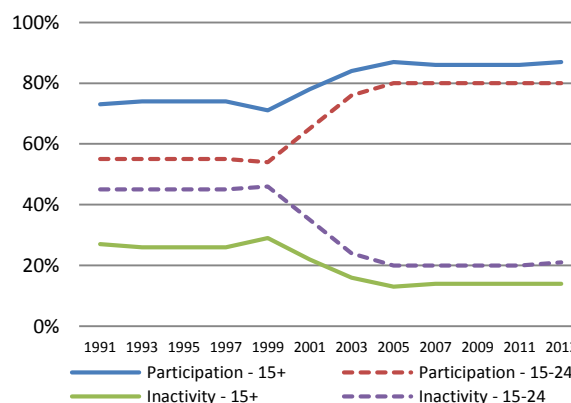
**Table 7: Employment rates⁴⁶, 2013
Age and Sex distribution**

Sex	Age	Employment rate
Men & women	Total	15+ 82 %
	Youth	15-24 72 %
	Adult	25+ 88 %
Men	Total	15+ 85 %
	Youth	15-24 74 %
	Adult	25+ 92 %
Women	Total	15+ 79 %
	Youth	15-24 70 %
	Adult	25+ 84 %

The participation rates started to increase fast in 1999 but the growth stalled in 2005 and stayed flat afterwards at 87 percent for total working-age population and 80 percent of the youth. In contrast the inactivity rate declined and the above-mentioned two segments reached 14 percent and 21 percent in 2013, respectively (Figure 2).

One of the reasons was related to the economic crisis and the education system broke down during the 2000s. Since schools did not absorb students, many people entered the labour market instead and as a strategy to survive. Based on the accessible data of education, there are indications than during the 2000s a high incidence of under-education increased which affected the economy's labour productivity and the job mismatch on the labour market.

Figure 2: Participation and inactivity rates, 1991-2013⁴⁷



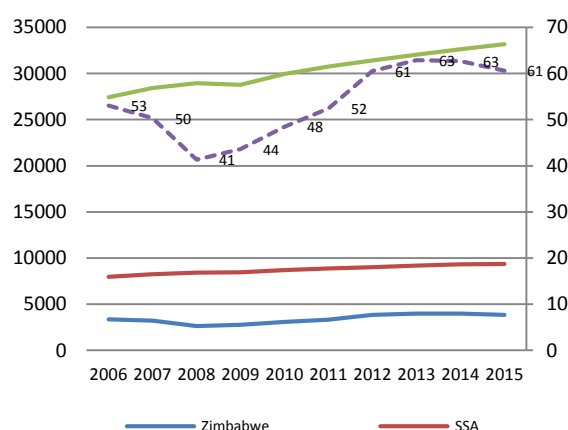
Note: The participation rate is proportion of the country's working-age population that engages actively in the labour market, either by working or



looking for work. The inactivity rate is a measure of the proportion of a country's working-age population that is not engaged actively in the labour market, either by working or looking for work.

The growth of the labour productivity has been low and remained far below the sub-Saharan Africa's average as well as remains lower than the output per worker in 2000 (Figure 3). An investigation from 2014 about what affected labor productivity on building projects in Zimbabwe showed a wide range of deficiencies that affected the labour productivity. This includes there were unavailability of materials, late payment of salaries and wages, supervisory incompetence, lack of manpower skills, lack of labor experience, plant breakdown, late delivery of materials, shortage of tools and equipment, and low remuneration.

Figure 3: Labour productivity⁴⁸, 2006-2015



Note: The labour productivity is measured as output per worker (GDP constant 2011 international US\$ in PPP). In addition, the stippled line shows Zimbabwe's output per worker (GDP constant 2005 US\$) (2000=100).

Based on comparative calculations, the labor productivity (i.e. GDP per worker) growth over the period 2004-2013 was negative at -2.5 percent per year, on average. Stated differently, the GDP per capita has simply not been able to grow as much as the employment rate. It is noteworthy that while the period 2004-2008 went through a declining labour productivity, but it changed in the second period, 2009-2013, that turned into a positive growth at 3.8 percent per year, on average. Basically the employment grew on average at exactly the same rate as the working age population (i.e. -0.1 percent) from 2004 to 2013 (see table below).

Table 8: Comparative average growth of GDP per capita, employment and working age population in Zimbabwe⁴⁹ 2004-2013, % change on average

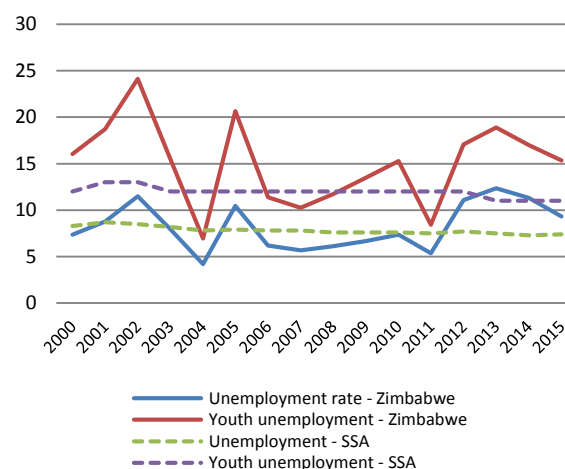
Years	GDP/employment	GDP/WAP	Employment/WAP
2004-08	-8.7 %	-9.0 %	-0.3 %
2009-13	3.8 %	3.9 %	0.1 %
2004-13	-2.5 %	-2.5 %	-0.1 %

Note: The columns above reflect: i) GDP per capita/employment equals the GDP per worker (i.e. labour productivity); ii) GDP/WAP equals the GDP per capita; and iii) employment/WAP equals the employment rate (ratio of workers to working-age population (15+)).

Unemployment

Based on ILO estimations the unemployment rate is 9.3 percent in 2015 while it is 15 percent among youth. The rates are slightly higher than the sub-Saharan Africa's averages (Figure 4). Most unemployment is hidden by employment in the informal sector where cash incomes are extremely low. ILO has calculated 'structural unemployment' rates – i.e. occurs when a labour market is unable to provide jobs for everyone who wants one because there is a mismatch between the skills of the unemployed workers and the skills needed for the available jobs - as high as 80 percent.⁵⁰ The quality of the data of unemployment has been questioned⁵¹, but still they can be used as indicative measures.

Figure 4: Unemployment rates in Zimbabwe and the sub-Saharan Africa (SSA), 2000-2015, %⁵²



Also a Poverty Assessment study from 2012 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 stood at 19 percent for women and 11 percent for men.⁵³

Sectoral Employment

In Zimbabwe a large majority (83 percent) of the employed population is unskilled; and has a ratio of 92 males per 100 women. Around 56 percent of the Zimbabwean population lives in communal lands and resettlement areas; and a further 10 percent on commercial farms. By contrast only 35 percent of the population lives in urban areas.

Agriculture absorbs 65 percent of the employment (Table 9), which is more or less equal among men and women. Around 96 percent of all agricultural workers hold informal jobs, while in non-agricultural activities the distribution between formal jobs (48 percent) and informal jobs (52 percent) is almost even.⁵⁴

Table 9: Employment (2004)⁵⁵ & GDP share (2013)⁵⁶
Sector & Sex distribution

Sector	Male employment †	Women employment	GDP share per sector
Mining & quarrying	78,386	12,984	10 %
Manufacturing	216,155	86,890	14 %
Electricity, gas & water	0	0	4.3 %
Construction	76,010	8,739	3.6 %
Trade, restaurants & hotels	118,238	94,131	15 %
Transport & communication	97,388	9,238	13 %
Finance, real estate & 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 %

Although the agricultural sector was known as more productive and more industrialised than many other sub-Saharan African countries, it was hard affected by a land reform and a following economic recession during the 2000s (see also the section General Economic Performance). Still, Zimbabwe has a large productions and exports of cash crops. Though the land reforms

decimated agricultural output, the farms are now recovering their production.⁵⁷

There are several initiatives in place to strengthen agricultural value chains which include the Zimbabwe Agricultural Competitiveness Program (ZimACP), the Zimbabwe Agricultural Income and Employment Development Program (ZimAIED), and the Credit Fund.

Reports have outlined that the major constraints to effective participation within the global value chains (GVCs) such as poor infrastructure, liquidity constraints, deindustrialization, technology gaps, lack of competitiveness, the high cost of doing business and uncertainties related to indigenization, and economic empowerment regulations.⁵⁸

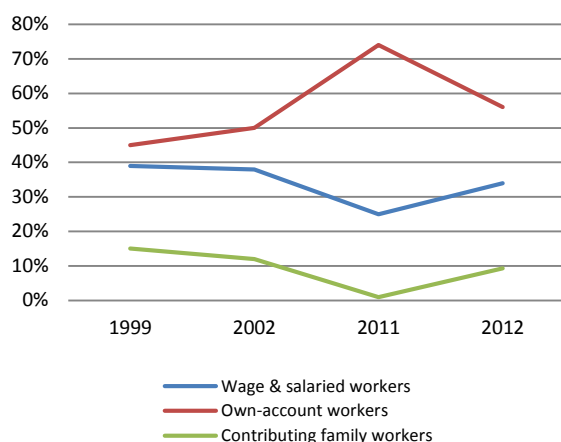
Mene dominated industries tend to have higher contributions to GDP relative to employment. Outside the agriculture sector, women tend to find work in several sectors, though gender gaps on the labour market are not as strongly pronounced in Zimbabwe as many other sub-Saharan African countries.

The status in employment experienced a change in the beginning in the 2000s, which was related to the mentioned political and economic crisis. Many of the country's most skilled and well educated citizens emigrated, leading to widespread labour shortages for managerial and technical jobs. Moreover, the decade-long severe contraction of the economy caused formal sector employment to drop significantly.

Data suggest that both wage & salaried workers and contributing family workers experienced a declining trend while the own-account workers increased during the 2000s, but the trends converted in 2011 (Figure 5). However, by 2012, the waged & salaried workers are still on a lower rate than before 2002 which is similarly with the contributing family workers. This suggests that workers operating in the informal economy increased significantly just as working conditions impoverished.



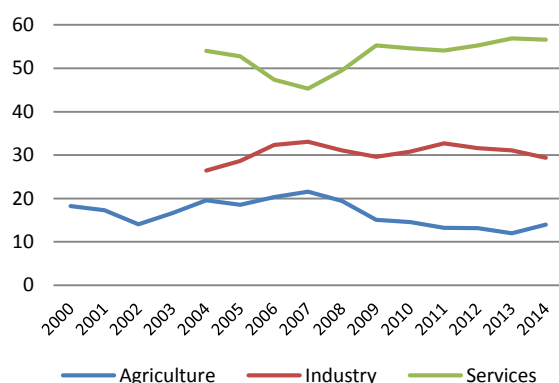
Figure 5: Status in employment in Zimbabwe, 1999-2012, %⁵⁹



Note: Self-employed workers operate for themselves instead of working for an employer that pays a salary or a wage. They own their own business, of which they are also the primary or sole operator. Contribution family workers are those workers who - working on their own account or with one or more partners - hold the type of job defined as a self-employed job, and have not engaged on a continuous basis any employees to work for them during the reference period.⁶⁰

The proportion of women in formal employment involved 17 percent for the year 1980. Today it has reached a 34 percent, an estimate covered from 2012. The highest concentration of formally working women is in health (58 percent), education (45 percent), agriculture (32 percent), finance and real estate (30 percent), and private domestic services (26 percent).

Figure 6: Zimbabwe's Sectors Share (% of GDP) ⁶¹



With relation to the Zimbabwe's sector share in terms of Gross Domestic Production (GDP) it has been registered that the agricultural sector has been on a declining trend since 2007. Instead it is turning a growth in the service sector. The industry sector share has basically stayed

around 30 percent (Figure 6). The latter continues to be only slightly higher than the sub-Saharan Africa's average which stood at 27 percent in 2014.

Migration

The migration flow of Zimbabwe has changed significantly. For instance, migration rates between 1998 and 2002 constituted -700,000 people, while between 2003 and 2007 it amounted to a -800,000 people. These reflect some very high net migration rates, i.e. where more people left than entering the country. However, the latest net migration rate was estimated as 400,000 more people enter than leave the country in the period 2008-2012. Thus, the net migration has been calculated as 1 out of 165 inhabitants. The top three destinations for Zimbabwean migrants are: South Africa, the United Kingdom, and Mozambique.⁶²

Table 10: Migration Facts⁶³

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

Migrant workers can join unions if they work in industries for which there are unions, and their rights are covered.

The previous mentioned mass migration was mainly due to the mentioned economic recession, where professionals and skilled workers have left the country for better opportunities.⁶⁴ These are also the most entrepreneurial groups of workers, and their departure has undermined the development of Zimbabwe.

According to the International Organization for Migration (IOM), 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) and 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.⁶⁵



In recent years 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 forces and voluntary migration.⁶⁶

Informal Economy

The Labour Force Survey 2011 estimated 84% of the employed population was considered to be in informal employment. This estimation includes the agricultural sector.⁶⁷ Based on the limitations of data available, the share of persons in informal employment in total non-agricultural employment was measured at 52 percent in 2004. It is assessed that the informal economy contributes to 20 percent of the country's GDP.

Table 11: Employment in the informal economy

Share of workers employed in the non-agricultural & informal sector	Zimbabwe (2004) ⁶⁸	52 %
	Sub-Saharan Africa (2001) ⁶⁹	78 %

Women constitute 53 percent of workers in informal employment and 29 percent of the formally employed. Educational attainment related to the type of employment is estimated at 95 percent of the informally employed population has secondary or lower levels of education. Around 91 percent of persons in informal employment are unskilled in their jobs, while more than 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 percent of persons in informal employment, indicating they had worked less than 40 hours compared to 12 percent for those in formal employment.⁷⁰ It is common in formal, but especially in informal employment, to have work for few hours a day.⁷¹

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 made it increasingly difficult to pay formal wages. As a result more workers were moving out of the formal sector due to the lack of job creation and social security. Informal jobs generally suffer from decent work deficits, with poor safety standards, and very low wages.⁷²

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.⁷³ 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. Observing the continued marginalization of this informal ‘sector’, 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 labours (i.e.: ZCTU) as they seek to improve their access to social services and infrastructure. Membership of ZCIEA has been very high at 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 10,500 members, as at January 2014.⁷⁴

The government has increased the taxes especially directed towards the informal workers. During the 2015, ZCIEA thus launched statements that pointed that the government should establish decent conditions for workers from the informal economy, before collecting taxes.

Child Labour

There are gaps in the country's legal framework against child labor as well as education is not compulsory or free, which increases children's vulnerability. According to the draft Labour Amendment Law from August 2015 child labour would be outlawed. The is related to raising the minimum age to under age 18 years which is aimed to encourage children to stay in school and delay their entry into formal employment. Children below the age of 18 years will not be able to be employed outside vocational



and technical training, even as part of training. This is most likely to change child labour in Zimbabwe.

Zimbabwe's Zimstats 2014 Child Labour Report shows children below the age of 18 years make up close to 50 percent (6.6 million) of the total population in Zimbabwe. An estimated 4.7 percent of children aged 5-14 years are in child labour. The report also showed that almost three quarters of the children in economic child labour were working in order to assist in household enterprise. Around 92 percent of children in economic child labour were not paid, as they were basically assisting family business such as selling in shop, rearing chickens for sale or assisting on family farm.

Table 12: Working children
Proportion of all children in age group

Region	Year	Type	Proportion
Zimbabwe ⁷⁵ (age 5-14)	2011	Child labourers	10 %
	2014		4.7 %
Sub-Saharan Africa ⁷⁶ (age 5-17)	2008	Children in employment	28 %
		Child labourers	25.4 %
		Hazardous work	12.7 %

Note: The child labourer data from Zimbabwe in the period 2011 and 2014 diverge in terms of survey methods. Thus, a direct comparison of these data was not conducted. Children in employment include all children who conduct some kind of work, whereas child labourers are a narrower term without mild forms of work. Hazardous work is the worst form of child labour as defined in ILO's Convention 182.

Child labour remains endemic in Zimbabwe in rural zones. ZimStat pointed out in the mentioned 2014 report that 97 percent of those in child labour were in rural zones. In addition, out of the child labour segment, 62 percent were boys and 38 percent are girls. A majority, 87 percent, were attending school, 10 percent left school; and 3 percent had never been in school.

Many children work on their own and large majority are in the industries of agriculture, domestic work, illicit activities, mining, and prostitution.⁷⁷ Conditions for children working on farms are particularly difficult since they are often 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.⁷⁸

Gender

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

Table 13: Gender Enterprise Survey, 2011⁷⁹

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

As already showed, most women are working in the agriculture sector, but they lack access to land. This is related to the land tenure systems, which are based on discriminatory cultural practices, and no attention has been placed to these systems.⁸⁰

According to the 2013 Constitution, the customary law is no longer exempt from the constitutional protection against non-discrimination.⁸¹ Although the new Constitution has been praised as progressive on issues of gender equality, its provisions, so far, have been focused more on paper than in practice.⁸² The setting up of the awaited Zimbabwe Gender Commission Act was published in July 2014, but the bill has been under revision in the Parliament and none members has not yet been appointed. Moreover, the participation of women in the formal labour market over the years has increased marginally and is far from attaining gender equity, despite legislation promotes it.



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”.⁸³

ZCTU has passed a resolution for a 50:50 gender representation in all its structures. This includes services to its affiliates. Most of the ZCTU affiliates have adopted a similar policy. Overall, they have not yet put the policy fully into practice. As an indication of this is that the gender profile of the ZCTU executive leadership reflects still a dominance of men which is also present among its affiliates. Women are present but usually confined to peripheral positions.

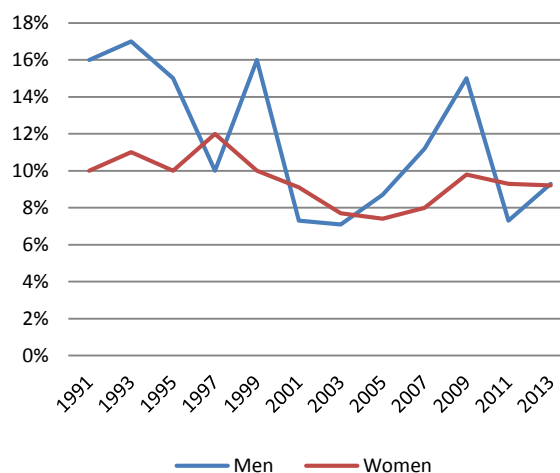
There is also a gender gap of ZCTU membership since an estimated 29 percent of members are women. This gap is related to that workers in the formal sector are men dominated. However, there is no significant relationship between women’s participation in the unions as members and in leadership. Instead this link between trade union activism and political leadership in many ways explains the limited participation of women in politics in Zimbabwe and as a reflection of the patriarchal structures of Zimbabwean society.⁸⁴

Youth

A revised National Youth Policy was launched in June 2013. Empowerment and participation as well as employment and sustainable livelihoods have been incorporated in the youth policy with diverse strategies.⁸⁵ Moreover, the estimations of men’s youth unemployment rate have been quite high with a volatile trend while women’s is slightly less unstable (Figure 7).

According to the ILO,⁸⁶ 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, graduates’ skills are not relevant to the needs of the communities and nation at large. Furthermore, the shrinking economy has not absorbing the youth on the labour market’s formal sector.

Figure 7: Zimbabwe’s youth unemployment trend, 1991-2013, %⁸⁷



Zimbabwe’s has reputation for a well-educated workforce (see the next section), but those with less than a secondary education make up 42 percent of the youth workforce, which is a troubling proportion. Reports argue that the stock of youth with less than primary education is also growing at a rate of 5 percent per year.⁸⁸ Many youth with less than a secondary education will find themselves employable only in agriculture and micro, small and medium enterprises (MSMEs), either as microenterprise owners or employees. For these youth, there are few alternative options available.

The informal economy is the main employer of youth in Zimbabwe. The MSMEs have typically much lower retention rates for interns or youth placements than formal sector firms. This is largely due to MSMEs inability to provide young employees with satisfactory career growth potential.

The traditional or informal apprenticeship in Zimbabwe is still frequently used in practice. It has some benefits, e.g. i) it does not have to conform to set times; ii) the workplace is accessible; iii) it is usually relevant to the market in which the master craftsman operates; iv) there are few entry qualifications required; and v) it is affordable for the rural and urban poor. Many studies have mentioned, though, that this ‘system’ has many flaws such as traditionally male dominated and not geared to meeting the challenges of changing technologies, among others.⁸⁹



EDUCATION

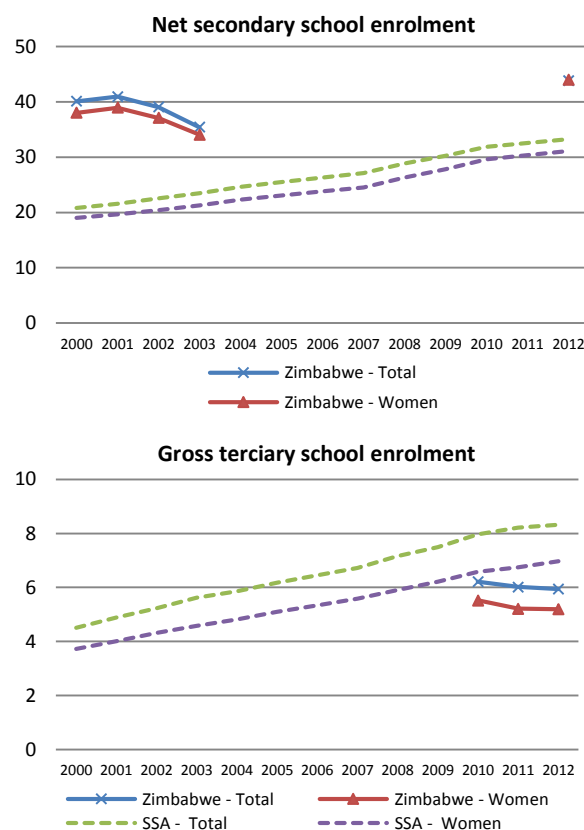
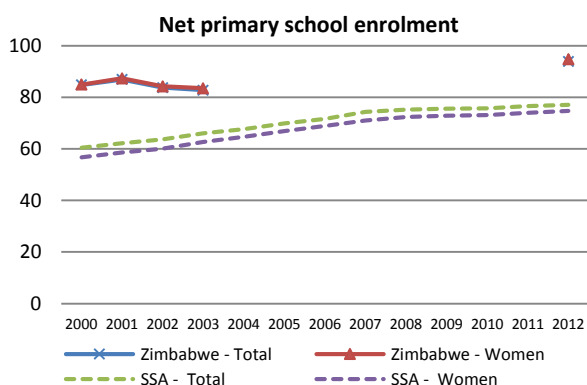
It is also a country with a vast young population, i.e. two out five (42%) of the population is below the age of 15 years.⁹⁰

Zimbabwe was once recognized as having one of the best education systems in Africa, and this legacy is likely why educational attainments is high in Zimbabwe. With an average 7.3 years of schooling per capita, Zimbabwe has a relatively well-educated population compared to other sub-Saharan African countries.

However, by the end of 2008, most schools and hospitals were closed due to a massive reduction of teachers who left their profession. As already mentioned, this was related to the economic crisis, an increase in HIV and AIDS as well as an outbreak of cholera in 2008. According to estimations from UNICEF, 94 percent of rural schools, serving the majority of the population, closed in 2009. Moreover, the attendance rates plummeted from over 80 percent to 20 percent.

Education enrolment rates in Zimbabwe have recently been registered again after a long period with a data gap. They demonstrate that the primary and secondary education levels remain higher than the sub-Saharan Africa's average. The tertiary level is below the sub-Saharan Africa's average and appears to be entering a declining trend.

Figure 8: School Levels and Enrolment (%), 2000-2012⁹¹
Total and Women, Zimbabwe and Sub-Saharan Africa (SSA)



Net enrolment is the ratio of children of official school age, who are enrolled in school to the population of the corresponding official school age. Gross enrolment is the ratio of total enrolment, regardless of age, to the population of the corresponding official school age. Gross primary enrolment is therefore sometimes higher than 100 %.

Supported by data from a survey demonstrated that about 18 percent had completed primary and 17 percent had some primary education; 29 percent of the employed population had completed secondary education as their highest level of education, 20 percent had some secondary education; and 11 percent of the currently employed population had tertiary education.

The Minister of Education has started far-reaching curriculum and administrative changes which directly affect teachers' professional and social life, and is hard criticized. Although the government promises to civil servants and teachers for better working conditions, but it has not been realized, e.g. they have often not received their salaries on time. 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.



There was limited statistical data regarding 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.

Informal apprenticeship schemes have shown considerable potential to provide skills in the informal economy. A country like Zimbabwe has taken measures to upgrade the skills of both trainers and apprentices, and to standardize and recognize skills at the national level.

SOCIAL PROTECTION

There exist a wide range of formal social protection systems in Zimbabwe. The main employment related social protection scheme is the National Pension Scheme (NPS). It is fully contributory with employees and employers each paying 4 percent of the salary. Self-employed and informal workers cannot join.⁹²

In 2010, the National Social Security Authority (NSSA) reported 1,248,060 active contributors in the NPS, equivalent at 20 percent of the labour force. This is a high coverage for a sub-Saharan Africa country. NPS' investment income was affected by the hyperinflation ending in 2009.⁹³ Moreover, corruption in the pension authority is also taking its toll on the pension scheme.⁹⁴

The 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.⁹⁵ Zimbabwe's health sector is divided into public and private sectors. Government operates with 70 percent of health facilities in the country, while the private sector owns about 30 percent. 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 percent of the total population is covered by medical aid schemes, and close to seven out of ten (68 percent), who are not receiving any social security funds, come from the rural areas.

Based on calculations, the country has a quite low health social protection coverage that was estimated at 1

percent of the population in 2011 and the public social protection expenditure at US\$8.6 per capita (Table 14).

Table 14: Public spending on social protection schemes, 2011⁹⁶

Public social protection expenditure, excl. health	ZWD	560 million
	US\$	115 million
	% 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

It is also noteworthy to mention that the old age effective coverage is also low at 6.2 percent in terms of the proportion of elderly and 17 percent are active contributors to a pension scheme (Table 15).

Table 15: Benefits, coverage and contributions to pension schemes (2006-2010)

Social benefits for the active age	% of GDP	0.1 %
Old age effective coverage (age 60+)	Proportion of elderly	6.2 %
Active contributors to a pension scheme	15-64 years	17 %

According to the Demographic Health Survey 2010-11, 93 percent of Zimbabwean women and 91 percent of men do not have medical insurance or other employer plans. In general, the social protection area has been underfunded and social protection strategy has been missing.⁹⁷ The government has taken some steps in terms of social protection initiatives. Besides there exist some informal schemes such as i) 'Burial Societies' that are pooling resources together to provide financial assistance to members in the event of death or illness; and ii) 'Co-operatives' pooling resources to curb financial and economic duress and initiate small business projects.



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 percent of salary in 2005 to 8 percent in 2010.⁹⁸ 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.⁹⁹

The AIDS levy – 3 percent tax on income - has become a proposed source of funding. An increase in revenue collected in the past years exists which is equivalent to 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 percent of the treatment program was financed by international donors.¹⁰⁰

GENERAL ECONOMIC PERFORMANCE

Zimbabwe has been able to progress and stabilize their economy since the end of the 2009's hyperinflation. The GDP has grown by around 1.8 percent per year on average in the period 2005-2014 and it is projected to reach 2.8 percent in 2015 (see also). The recovery of the economy remains fragile, though.¹⁰¹

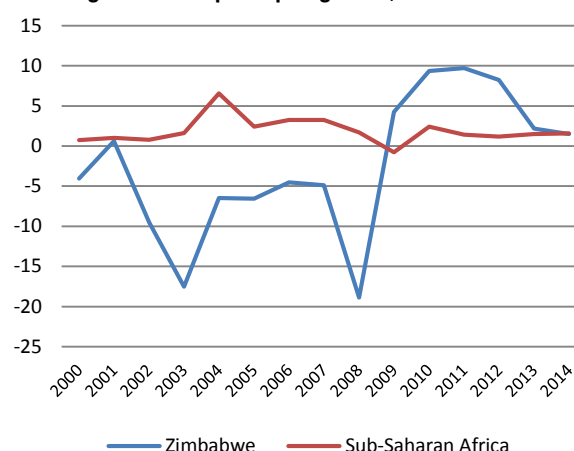
Table 16: General Economic Performance Key Facts, 2014¹⁰²

GDP (US\$)	14.2 Billion US\$
GDP Real Growth	3.8 %
Doing Business¹⁰³	155 of 189 countries
HDI¹⁰⁴ (2013)	0.509 155 of 188 countries
Gini Index (2007)	50.1 22 of 144 countries

Notes: A high Doing Business ranking means the regulatory environment is more conducive to the start-up and operation of a local firm.
The Human Development Index (HDI) measures the average of a long and healthy life, access to knowledge and a decent standard of living.
This Gini Index is measured if income were distributed with perfect 'equality', the index would be zero; if income were distributed with perfect 'inequality', the index would be 100.

Figure 9 shows the turmoil economic development that ended in a very negative GDP growth per capita during the 2000s. However, in the beginning of the 2010s it increased rapidly, much higher than the sub-Saharan Africa's average growth, but since 2012 they have been on par at around 1.5 percent.

Figure 9: GDP per capita growth, 2000-2014¹⁰⁵

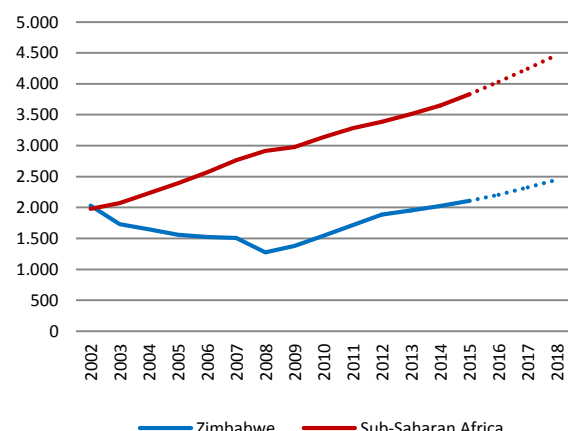


Another way to show the impact of the economic downturn is that Zimbabwe's GDP per capita in Purchasing Power Parity (PPP) experienced a sharp drop and decoupled by the sub-Saharan Africa's average growth rate (Figure 10).

Stated differently the GDP per capita in PPP growth fell from US\$2,000 in 2002 to US\$1,300 in 2008, but it is now rebounded and reached again US\$2,000 in 2014. It could be interpreted as a lost decade of economic growth per capita in the country. Furthermore, it is estimated to be difficult for Zimbabwe to return to the region's average trend level many years ahead.



Figure 10: GDP per capita (PPP) trend and forecast¹⁰⁶



Other estimations have illustrated that 61 percent of the working poor lived under US\$1.25 a day, while 76 percent lived under US\$2. In comparison, the sub-Saharan Africa's averages of working poor in 2005 were 49 percent and 71 percent, respectively (Figure 11). The Gini Index shows a quite unequal distribution of family income, ranking Zimbabwe as number 22 out of 144 countries ().

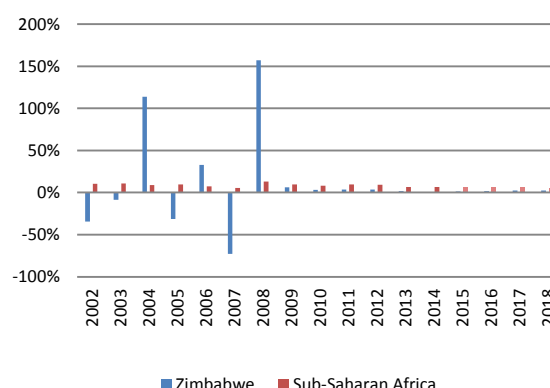
Figure 11: Working poor¹⁰⁷

Region	Age 15+	Share of workers in total employment	
		1.25 US\$ a day	2 US\$ a day
Zimbabwe (2005)		61 %	76 %
Sub-Saharan Africa (2005)		49 %	71 %
Sub-Saharan Africa (2013)		39 %	62 %

Note: 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.

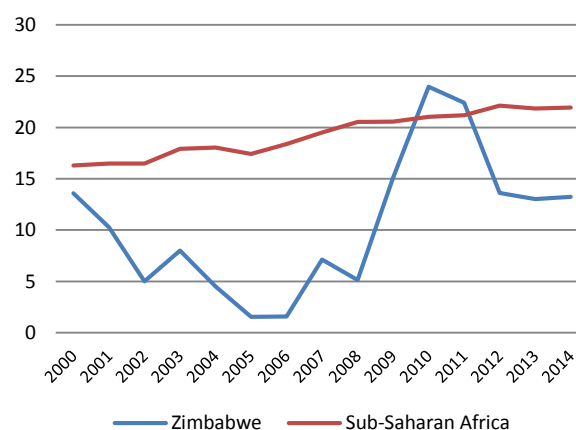
After 2000's hyperinflation period, the inflation of consumer prices stabilized in 2009 and has remained in the low single digits (Figure 12), mainly due to the introduction of a multi-currency system; which included that the U.S. dollar was used in government transactions. As an impact of the hyperinflation and the dollarization of the economy have brought goods back to the stores, but many have been imported and set by high prices.

Figure 12: Inflation trend and forecast (%)¹⁰⁸



Also the capital formation was affected hard by the economic turmoil during the 2000s. However, the capital formation rebounded fast in 2009 and peaked in 2010, reaching the sub-Saharan Africa's average. Since then it entered a decline trend again due to deteriorating terms of trade, adverse weather and increasing policy instability.

Figure 13: Gross Fixed Capital Formation, % of GDP¹⁰⁹



Doing Business indicators have ranked Zimbabwe as 155 out of 189 countries in periods 2015-2016 – a 2 level step-down from the previous period 2014-2015 (Table 17). The highest scoring topics are getting credit (79 out of 189 countries), which experienced some improvements, and protection minority investors (81). It was registered that dealing with construction permits (184), starting a business (182) and enforcing contracts (166) are scoring very low.



Table 17: Zimbabwe's Doing Business¹¹⁰

Topics	2016	2015	Change
Starting a Business	182	179	↓ -3
Dealing with Construction Permits	184	185	↑ 1
Getting Electricity	161	160	↓ -1
Registering Property	114	114	No change
Getting Credit	79	90	↑ 11
Protecting Minority Investors	81	87	↑ 6
Paying Taxes	146	142	↓ -3
Trading Across Borders	100	99	↓ -1
Enforcing Contracts	166	166	No change
Resolving Insolvency	152	156	↑ 4

The Doing Business 2016 indicators rank from 1 (top) to 189 (bottom) among other countries. The rankings tell much about the business environment, but do not measure all aspects of the business surroundings that matter to firms and investors or that affects the competitiveness of the economy. Still, a high ranking does mean that the government has created a regulatory environment conducive to operating a business.

Note: This Index has been controversial due to flawed data, especially in terms of labour market flexibility and undervalued paying taxes. However, the table can still be used as indicative measurement with reservations.¹¹¹

Overall the governance environment in Zimbabwe has experienced some improvements, especially in terms of political stability, which was related to the formation of the coalition Government of National Unity from 2009; and general governance effectiveness. Notwithstanding, the country continues with very low rankings on all six governance indicators. The ranking of rule of law, regulatory quality, and control of corruption, remain extremely low (Table 18).

Table 18: Zimbabwe's Governance Indicators, 2009-2014¹¹²

Indicator	2009	2014	Change
Voice & Accountability	-1.54 / 7.1 %	-1.28 / 12 %	↑
Political Stability	-1.16 / 14 %	-0.65 / 24 %	↑
Government Effectiveness	-1.52 / 2.9 %	-1.18 / 12 %	↑
Regulatory Quality	-2.10 / 1.9 %	-1.89 / 2.4 %	↑
Rule of Law	-1.84 / 1.0 %	-1.42 / 4.3 %	↑
Control of Corruption	-1.32 / 5.3 %	-1.39 / 4.3 %	↓

Note: The Governance Indicators score from -2.5 to 2.5 while the percentiles rank from 0 (lowest) to 100 (highest).¹¹³

TRADE

Imports and exports play a large role in Zimbabwe's economy. It has been estimated that the export sector contributes by 27 percent of GDP while the import sector by 53 percent. The foreign direct investment (FDI) was assessed at 3.8 percent of GDP (Table 19).

Table 19: Trade and Foreign Direct Investment¹¹⁴ (2014 est.)

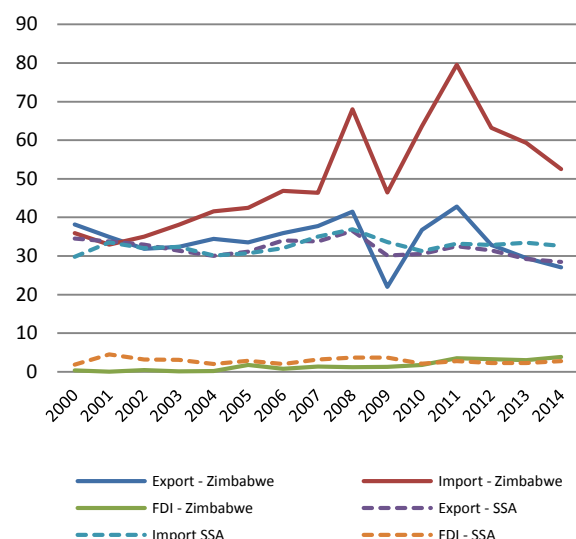
Exports	3.8 billion US\$ 27% of GDP
Imports	7.5 billion US\$ 53% of GDP
FDI Flows ¹¹⁵	545 million US\$ 3.8% of GDP
FDI Stock	N/A

The trade balance gap widened significantly during the 2000s. It is noteworthy to mention that the export sector trend stayed slightly higher than the sub-Saharan Africa's average, except in 2008-2009 where it fell deeply as a result of the mentioned hyperinflation and economic contraction. The import sector rose significant during the 2000s and became much higher than the sub-Saharan Africa's average. Thus, a gap between the export and import sectors widened deeply.

The FDI was affected by the Indigenization and Economic Empowerment Act from 2008 which created a lack of clarity of the regulation and wary among investors. According to the Act, Zimbabweans received the right to take over and control many foreign owned companies in Zimbabwe. However, in recent years, the FDI trend has been similarly as the sub-Saharan Africa's average (Figure 14).



Figure 14: Trade and Foreign Direct Investment (FDI), 2000-2014¹¹⁶



The export economy is principally in agriculture and mining (

Figure 16). The former sector has been affected by poor harvests, while the latter by low diamond revenues. Generally, decreasing investments in the export sector were also affected by the mentioned Indigenization and Economic Empowerment Act.

In 2013 the government proposed an export tax of 15 percent revenue on unrefined platinum to encourage platinum mining companies to invest in a smelter and refinery of the minerals they mine. The proposal was supposed to initiate in 2015 but was deferred to initiate in January 2017. During 2014-15 there have been several tough wage negotiations between the Chamber of Mines and the mine unions.

Foreign trade has been hampered by political instability, low government effectiveness and difficulties of doing business. Economic sanctions, mainly from western countries, have led Zimbabwe to open up for Chinese investment and now Chinese control up to 80 percent of mines and manufacture. In January 2015, the Chinese, Indian, Australian, and Japanese currencies was accepted as legal tender as part of the government's effort to boost trade and attract foreign investment.

Figure 15: Main export markets (2013)¹¹⁷

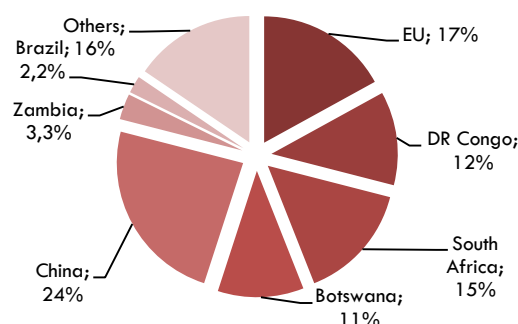
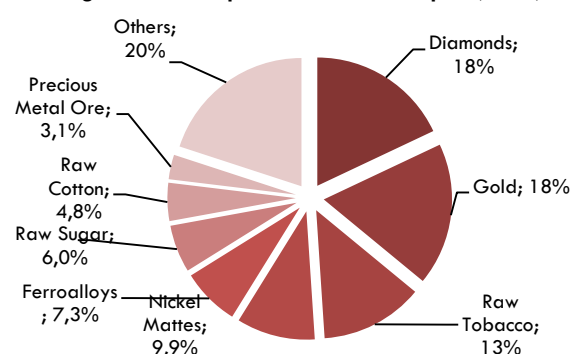


Figure 16: Main products share of export (2012)¹¹⁸



Trade Agreements

Zimbabwe has currently five preferential bilateral trade agreements under which exporters can benefit. These include: Botswana, Namibia, Malawi, South Africa, and Mozambique. 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.

In 2015, Zimbabwe and South Africa signed several trade related agreements: i) the Bi-National Commission (BNC) Agreement; ii) the Memorandum of Understanding on Diplomatic Consultations; iii) the Agreement on Cooperation on Water Resources Management and a Joint Water Commission; iv) the mutual assistance between customs administrations, which will further cooperation towards the establishment of a one-stop border post; and v) the Memorandum of Understanding on Trade Cooperation.



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 where the United States has not declared eligible for the African Growth and Opportunity Act (AGOA).

Special Economic Zones (SEZ)

SEZ were originally set up in 1987 and the government promulgated legislation in 1996. Based on the limitations of data available there was estimated that EPZs had created over 32,000 jobs and US\$172 million worth of investments in 2004. By 2011, the country operates with an estimated 183 EPZ-designated companies. Benefits

include a five-year tax holiday, duty-free importation of raw materials and capital equipment for use in the EPZ, and no tax liability from capital gains arising from the sale of property forming part of the investment in EPZs.

Some 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 and Economic Empowerment Act, which requires foreign businesses valued over US\$50,000 to cede 51 percent of the shareholding of their Zimbabwean operations to black Zimbabweans, has been criticized and potentially affect Chinese, Congolese, Indians, Pakistanis, and Nigerians.



APPENDIX: ADDITIONAL DATA

Table 20: Trade Unions in Zimbabwe^{cxix}

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	Women Members 2012/13	Dues	No. of CBAs	Workers covered by CBAs	No. 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	-	-	-	-	-
National Union of Metal and Affiliated Industries	ZCTU	8,846	442	-	-	-	-
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%
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%
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%
Railway Yard Operations Union	ZTUC	-	-	-	-	-	-
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 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 & Paper Manufacturing Workers Union	ZCTU	480	65	35 c	1	Non managerial	100%



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%
Public Services Association	-	3,916	1,566	-	-	-	-
Zimbabwe Educational Scientific Social and Cultural Workers Union	-	6,682	2,400	35 c	1	Non managerial	80%
Zimbabwe Security Guards Union	-	4,600	798	-	-	-	-
Zimbabwe State Universities	-	N/A	3,500	35 c	Still to negotiate one	Non managerial	Zimbabwe State Universities
National Mine Workers Union	-	23,000	1,209	35 c	1	Non managerial	100%
National Energy Workers Unions	-	-	-	-	-	-	-
Transport and General Workers Union	-	2,800	127	-	-	-	N/A
Zimbabwe Metal, Energy & Allied Industry Worker Union	-	8,448	-	35 c	1	Non managerial	80%
Zimbabwe Public Service Association	-	3,916	N/A	35 c	1	Non managerial	100%
Zimbabwe State Universities and Allied Workers' Union	-	-	-	-	-	-	-

*) ZFTU is registered as a national federation by the Global Union Directory. However, very few data is available on the internet of this federation, including number of members.

Note: This table is based on the limitations of data available. The registered affiliated national trade union to the ZCTU was from 2014, based on data from ZCTU Wikipedia; the number of membership, women participation rate, CBAs and OHS are covering the period 2012-2013.



Table 21: Ratified ILO Conventions^{cxx}

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
Occupational Safety and Health	C155 - Occupational Safety and Health Convention, 1981	2003
	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><i>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.</i></p> <p><i>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.</i></p> <p><i>In addition, there are 71 conventions, which ILO considers "up-to-date" and actively promotes.</i></p>		



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