

Labour Market Profile Tanzania & Zanzibar 2021/2022



This profile provides a comprehensive overview of the labour market's structure, development, and challenges.

Danish Trade Union
Development Agency



ULANDSSEKRETARIATET – DTDA
DANISH TRADE UNION DEVELOPMENT AGENCY

PREFACE

Danish Trade Union Development Agency (DTDA) is the development organisation of the Danish trade union movement. This agency was established in 1987 by the two largest Danish confederations – Danish Federation of Trade Unions (Danish acronym: LO) and Danish Confederation of Professionals (Danish acronym: FTF). These confederations merged to become the Danish Trade Union Confederation (Danish acronym: FH) in January 2019. Correspondingly, the former known as LO/FTF Council changed to DTDA.

The work of DTDA is in line with the global Decent Work Agenda (DWA) based on its pillars: creating decent jobs, guaranteeing rights at work, extending social protection, and promoting social dialogue. The overall development objective of DTDA's interventions in the South is to eradicate poverty and support the development of just and democratic societies by promoting the DWA.

DTDA collaborates with trade union organisations in Africa, Asia, Latin America, and the Middle East. The programmes' immediate objective is to assist the partner organisations in becoming change-agents in their own national and regional labour market context, capable of achieving tangible improvements in the national DWA conditions and achieving the labour-related Sustainable Development Goals (SDGs).

The Labour Market Profile (LMP) format provides a comprehensive overview of the labour market's structure, development, and challenges. It divides into nine thematic sections describing the economic performance, labour legislation, social partners, social dialogue, violations of trade union rights, working conditions, the general status of the workforce, education, and social protection.

In the framework of DWA and SDGs, LMPs follow several central indicators addressing labour market development aspects, especially the unionism evolution, social dialogue and bi-/tri-partite mechanisms, policy development, and legal reforms status vis-à-vis ILO conventions and labour standards, among others.

Primary sources of data and information for LMPs are:

- As part of programme implementation and monitoring, national partner organisations provide annual narrative progress reports, including

information on labour market developments. Furthermore, specific data and information relating to central indicators are collected using a unique data collection tool. It is worthwhile to mention that fully updated data of the Covid-19 pandemic impact on central employment statistics and unionism were scarce for 2020.

- National statistical institutions and international databanks are used as a source for collection of general (statistical) data and information such as ILOSTAT and NATLEX, World Bank Open Data, ITUC Survey of Violations of Trade Union Rights, the U.S. Department of State, as well as other internationally recognised labour-related global indexes.
- Academia and media sources (for example, LabourStart, national news, among others) are furthermore used in the available research on labour market issues.

The profile is regularly updated. The current version covers the period from 2021 to 2022.

Labour Market Profiles for more than 30 countries are available on DTDA's website:
<https://www.ulandssekretariatet.dk/>.

DTDA prepared the Labour Market Profile in Copenhagen but could not compile information and data collection on key labour market indicators without the support from the DTDA Sub-Region Office in Tanzania in close collaboration with the Trade Unions Congress of Tanzania (TUCTA) and Zanzibar Trade Union Congress (ZATUC). If any questions arise to the profile, please contact Mr Kasper Andersen (kan@dtda.dk) from DTDA.

Cover photo shows the Company 2000 Industries in Tanzania; photographed by Ms Dorthe Friis Pedersen.

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EXECUTIVE SUMMARY

Tanzania's economy delivered impressive growth during the last two decades and entered as a low-medium-income country in 2019. Real minimal wages deteriorated slightly, supporting inequality on the rise and weak poverty reduction during the 2010s. Several economic sectors got hit by the global coronavirus (Covid-19) pandemic impact in 2020, expecting a poverty upsurge in Tanzania.

In recent years, few significant labour reforms were approved, focusing mainly on reshuffled the Mainland's social security system from 2018. The legal framework to protect unionism's rights has flaws concerning international standards. Major trade agreements' labour clauses are just slowly reinforcing changes in the national labour regulations. The informal economy is widespread, creating loopholes in labour and business regulation, often due to workers' and employers' lack of awareness or incentives.

Central tripartite institutions meet regularly, and bi-partite initiatives are evolving. The application for mediation and arbitration increased in recent years, along with recognition of forum and choice of law for determining contractual disputes. Collective Bargaining Agreements (CBAs) have low coverage and often weaknesses in wage and working-hours clauses. Employers' view on cooperation in labour-employer relations is at the medium-level. Tanzania Mainland's trade union membership rate halted during the 2010s except for a considerable upsurge in 2019 connected to organised teachers' affiliation. The trade union density of employees reached 19% in 2019. Zanzibar's trade union membership rate improved after internal organisational reform in 2015. However, it got significantly affected by the Covid-19 impact: trade union density plummeted to approximately 18% in 2020. The Global Rights Index on workers' rights ranked Tanzania at 4 out of 5+ (5+ is worst) in 2020.

Tanzania's population is mounting, with some shifts for a falling fertility rate and rising life expectancy. The labour participation rate hovers above the regional average and declines in the margin, mainly due to meagre school enrolment expansions. The agriculture sector dominates employment, but many are moving to the service sector, mirrored in the growing urbanisation. Expanding the industry sector was feeble, and the segment of more formal employees rose only slowly during the 2010s. Unemployment is an urban phenomenon for youth. The formal sector does not create

sufficient decent jobs. A majority enter low-skill occupations in the informal economy sticking to skills gaps and mismatches: 59% of young workers (aged 15–29) are undereducated, while 9% are overeducated.

More left than entering the country for almost three decades, driven by demographic pressure, poverty, and increased living costs. Net migration became slightly more balanced during the 2010s, influenced by the European Union's 'closed-door' migration policy and refugee returnees. Personal remittances are not an essential part of the economy, even significantly lower than foreign direct investments. A high inflow of refugees rebounded at the end of the 2010s, constituted 0.5% of Tanzania's population in 2020. Most refugees are wedged in camps, and recently with tightening restricted income-generating activities.

The country is striving to address gender gaps and inequities, and it has improved women's working conditions in the public sector. However, the social structures still affect gender disparities, e.g., women's mean monthly income was 40% lower than men's in the private sector and controversial school ban that discriminates against females in parenthood.

Mainland's education system introduced fee-free for public primary and secondary schools in November 2015. The results were paltry until a significant rising school enrolment rate in 2019. The government's ambitious goal to expand the Technical and Vocational Education and Training (TVET) has been haunted by a considerable skill gap in the lower level. It must increase by four folds to be on par with other medium-income countries. Social partners recently initiated to accelerate their support to the TVET system. Access to Information and Communications Technology (ICT) digitally divided the country but listed the fastest upsurge in applications compared to neighbouring countries. Generally, Zanzibar's education system illustrated significantly better school enrolment and attainment than the Mainland.

Tanzania population's health coverage showed improvements reaching 33% in 2019, backed by social security reforms in 2018. However, persons above retirement age receiving a pension remains very low at 3.2%, significantly lower than neighbouring countries. Unemployment benefit schemes protect very few, and CBAs usually void the unemployment fund clause.

The table below provides an overview of key labour market indicators' status in the framework of the Decent Work Agenda.

On the next page, Page iv, the second table presents an overview of the current value and targets of the Sustainable Development Goals' indicators concerning labour market issues.

Status of Key Labour Market Indicators in the Framework of the Decent Work Agenda (DWA) in Tanzania and Zanzibar, 2019/2020

Creating decent jobs	
Policy reforms addressing creation of decent employment	Mainland operates with the Second Five Year Development Plan (FYDP II) (2016/17–2020/21) and several sectoral plans. Besides, Tanzania's Development Vision (TDV) 2025 aspires to have the country transformed into a middle-income and semi-industrialised nation by 2025 reaching i) high quality and sustainable livelihoods, ii) peace, stability, and unity, iii) good governance and the rule of law, iv) an educated and learning society, and v) a strong and competitive economy. Zanzibar is covered by a series of adopted policies on general development, employment, poverty reduction, and industrialisation.
ILO standard setting on improvement of status of workers from the informal economy	No - There is no tri-partite National Informal Economy Forum. In recent years, social security policies are addressing workers' status from the informal economy in Mainland and Zanzibar.
Guaranteeing rights at work	
Growth in trade union members from year 2016 to 2019/20 (%)	Mainland: 39%. Zanzibar: 2.5%.
Violations of trade union rights	Ranking 4 out of 5 (5+ is worst). *
Labour legislation is improved according to ILO standards	Recent significant law reforms were the Employment and Labour Relations Act and the Labour Institution Act, both from 2017, and several reforms of social security funds in 2018. Labour regulations did not envisage a COVID-19 or similar situation that put many employers and workers in a challenging position.
Partner organizations with minimum 30% women representation in decision-making bodies	Mainland: Yes, registering of 33% representation in decision-making bodies. Zanzibar: Yes, registered of 55% representation in decision-making bodies.
Extending social protection	
Health social protection coverage as % of total population	Mainland: 33%. Zanzibar: 100%.
Workers from the informal economy have access to national social security schemes	Mainland: Yes, but not fully coverage. Zanzibar: Yes, but not fully coverage.
Promoting social dialogue	
Trade union density of total employment (%)	Mainland: 3.2% (2019) Zanzibar: 2.4% (2020)
Trade union density of employees (%)	Mainland: 19% (2019) Zanzibar: 18% (2020)
Cooperation in labour-employer relations	Ranking 77 out of 141 (1 is best) in 2019. **
Number of Collective Bargaining Agreements (CBAs)	Mainland: 444 in 2019 and 416 in 2020. Zanzibar: 12 (2019), none in 2020 due to COVID-19.
Workers' coverage of Collective Bargaining Agreements to employees	Mainland: 14% in 2019 8.2% in 2020. Zanzibar: 6.6% (2019).
Bi-/tri- partite agreements concluded	Mainland: Yes, recommendations for amendment of labour laws and regulations, social security, and ongoing meetings in tri-partite fora. TUCTA and ATE jointly developed a CBA framework to harmonise the negotiations processes, leading to signing agreements: TUICO reported on its calendar 35 new CBAs signed in 2019. Zanzibar: Yes, ongoing meetings in tri-partite institutions and achieved undersigning several Memorandum of Understanding (MoU) and new CBAs. However, many bi-/tri partite developments were stalled in 2020 due to COVID-19 pandemic preventive issues.

* It is estimated as "systematic violations of rights": Workers in countries with the rating 4 have reported systematic violations. The government and/or companies are engaged in serious efforts to crush the collective voice of workers putting fundamental rights under threat.

** This indicator is based on data from the Global Competitiveness Index that represents employers' opinion from surveys.
Sources: International Trade Union Confederation; World Economic Forum; International Labour Organisation; DTDA research, and own calculations.

Status of key Sustainable Development Goals in labour market related issues in Tanzania, latest values

Indicators	Value	Year	SDG Targets
1.1.1: Working poverty rate (percentage of employed living below US\$1.9 PPP)	44%	2019	By 2030, eradicate extreme poverty for all people everywhere, currently measured as people living on less than US\$1.9 a day.
1.3.1: The population effectively covered by a social protection system, including social protection floors.	3.2% *	2016	Implement nationally appropriate social protection systems and measures for all, including floors, and by 2030 achieve substantial coverage of the poor and the vulnerable.
5.5.2: Women share of employment in managerial positions.	23%	2014	Ensure women's full and effective participation and equal opportunities for leadership at all levels of decision-making in political, economic, and public life.
8.2.1: Annual growth rate of output per worker (GDP constant 2010 US \$)	2.4%	2019	Sustain per capita economic growth in accordance with national circumstances and, in particular, at least 7 per cent gross domestic product growth per annum in the least developed countries.
8.2.1: Annual growth rate of real GDP per employed person (GDP constant 2011 international \$ in PPP)	2.4%	2019	Achieve higher levels of economic productivity through diversification, technological upgrading and innovation through a focus on high value added and labour-intensive sectors.
8.3.1: Proportion of informal employment in non-agriculture employment	91%	2014	Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity, and innovation, and encourage the formalisation and growth of micro-, small- and medium-sized enterprises, through access to financial services.
8.3.1: Women	93%	2014	
8.3.1: Men	89%	2014	
8.5.1: Average hourly earnings of women and men employees	-	-	By 2030, achieve full and productive employment and decent work for all women and men, including young people and persons with disabilities, and equal pay for work of equal value.
8.5.2: Unemployment rate (Total, 15+)	2.1%	2014	
8.5.2: Women, 15+	2.7%	2014	
8.5.2: Women, 15-24 years	4.6%	2014	
8.5.2: Men, 15+	1.6%	2014	
8.5.2: Men, 15-24 years	3.1%	2014	
8.6.1: Proportion of youth (15-24 years) not in education, employment or training)	15%	2014	By 2020, substantially reduce the proportion of youth not in employment, education, or training.
8.7.1: Proportion and number of children aged 5-17 years engaged in economic activity (Total)	24%	2014	Take immediate and effective measures to eradicate forced labour, end modern slavery and human trafficking and secure the prohibition and elimination of the worst forms of child labour, including recruitment and use of child soldiers, and by 2025, end child labour in all its forms.
8.7.1: Girls	24%	2014	
8.7.1: Boys	25%	2014	
8.8.1: Frequency rates of fatal occupational injuries per 100.000 workers, annual.	-	-	Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment.
8.8.2: Level of national compliance with labour rights (freedom of association and collective bargaining) based on ILO textual sources and national legislation.	1.77 **	2017	
9.2.2: Manufacturing employment as a proportion of total employment	3.0%	2014	Promote inclusive and sustainable industrialisation and, by 2030, significantly raise industry's share of employment and gross domestic product, in line with national circumstances, and double its share in least developed countries.
10.4.1: Labour income share as a percent of GDP	49%	2017	Adopt policies, especially fiscal, wage and social protection policies, and progressively achieve greater equality.

* Persons above retirement age receiving a pension; see more in Table 22.

** The value has a range from 0 to 10, with 0 being the best possible score (indicating higher levels of compliance with FACB rights) and 10 the worst (indicating lower levels of compliance with FACB rights) based on ILO textual sources and national legislation.

Source: ILO, Key Indicators of the Labour Market (KILM).

COUNTRY MAP



Source: CIA, *The World Factbook*, Tanzania.

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ECONOMIC PERFORMANCE

Tanzania has experienced a transition towards a more liberalised economy aided by political and social stability. The government keeps a presence in the telecommunications, banking, energy, and mining sectors. The fast-growing sectors, such as construction, transport, and financial services, not to mention the vast natural resource wealth and tourism, lead the steady economic growth during the 2010s. The government also promoted fiscal stimulus measures and easier monetary policies to keep the economy's tempo and benefited from low oil prices.

Gross Domestic Product (GDP) per capita growth was hovering far above the sub-Saharan Africa average, 3.1% vs -0.5%, respectively, at the end of the 2010s. This growth backed Tanzania exceeding the threshold for lower-middle-income status in 2019. It is worthwhile to mention that Tanzania's GDP per capita value is 30% lower than the regional average (see more in Table 1). The official impressive GDP numbers appeared questionable compared to other murkier data such as declining tax revenues and bank lending to companies.¹

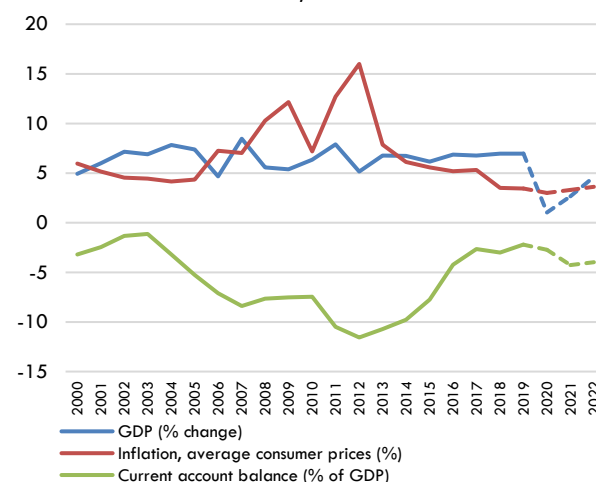
The economy was challenged by the ongoing global coronavirus (Covid-19) pandemic in 2020, especially in sectors reliant on global demand. Notably, the export and tourism sector declined significantly. Tanzania's economic growth was projected to drop from 7.0% in 2019 to 1.0% in 2020. Private demand showed a deceleration, and credit growth has slowed. It led to job creation freeze-up, salary cut-off, or retrenchments. Imports of capital goods declined by about 24% year-over-year in the second quarter of 2020.² The government reduced the salary tax to a single digit 9% to bring relief to all employees. Inflation has been projected below 4% on average since 2018 (Figure 1).

Table 1: Tanzania's key economic data, projections, 2019-2022

Values	2019	2020	2021	2022
GDP (current, billion, US\$)	60.8bn	63.2bn	65.9bn	70.1bn
GDP per capita (current, US\$)	1,080	1,090	1,104	1,139
Total investment (% of GDP)	40%	34%	37%	38%
Gross national savings (% of GDP)	33%	33%	33%	34%
General government total expenditure (% of GDP)	16%	16%	16%	16%
General government gross debt (% of GDP)	38%	38%	38%	37%

Sources: International Monetary Fund, World Economic Outlook Database, April 2021.

Figure 1: Gross domestic product, inflation, and current account balance in Tanzania, 2000-2022



Sources: International Monetary Fund, World Economic Outlook Database, April 2021.

The current account gap, representing a nation's transactions with the rest of the world, was curbed during the 2010s (see more in Table 1 and Figure 1). Development of the export sector has been stalled in Tanzania: its share dropped by seven percentage points during the 2010s, reaching 15% of GDP in 2017, even significantly lower than the sub-Saharan Africa average, at 27%. Tanzania's mineral exports represented 24% of total exports in 2019, out of which gold exports accounted for more than 90% of these exports. Gold exports increased by 83% over the past five years benefitted from a hike in international prices. The Tanzanian tourism sector is the country's number one foreign currency earner. The country also generates foreign currency through manufactured goods, crops, fish and fish products, and horticultural products.

Data shows that the gross fixed capital formation in Tanzania has been relatively high in the 2010s, achieving 33% of GDP on average, significantly higher than the sub-Saharan Africa average, at 19%.³ Tanzania is one of the most preferred destinations for foreign investment in Africa. The Foreign Direct Investments (FDI) inflow reached 3.0% of GDP on average in the 2010s, which was one percentage point higher than the regional average. The mining sector, oil and gas industry, and the primary agricultural products sector (coffee, cashew nuts, and tobacco) draw most FDI. It is worthwhile to mention that since 2016 the FDI inflow reduced. Reforms of the mining sector's regulations allowed the government to renegotiate mining contracts, partially nationalise mining companies, introduce higher royalties, enforce local beneficiation of minerals, and bring in strict local-content requirements.⁴ Tanzania's Mines, Energy, Construction, and Allied Workers' Union

emphasises to improve organising workers in the mining sector. In addition, investors and potential investors often find difficulty hiring foreign workers, complicated tax policies, increased local content requirements, lack of trust between the government and the private sector, and mandatory initial public offerings (IPOs) in key industries.

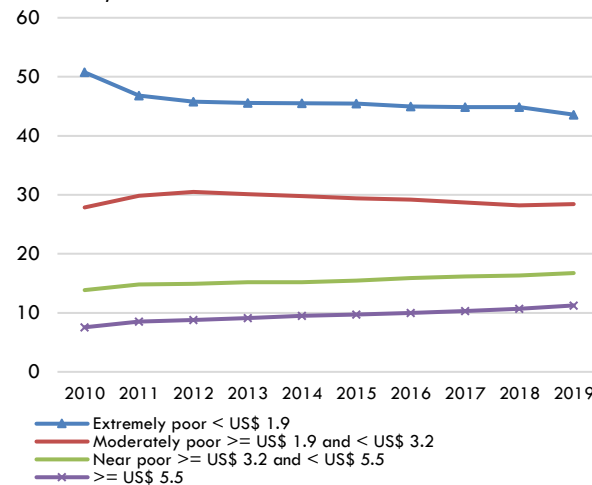
Concerning the complex bureaucratic procedures of doing business in Tanzania, the Doing Business Index ranked the country as 141 out of 190 countries (1st is best) in 2020. Out of ten indicators, the country's best rankings are getting credit (67) and enforcing contracts (71). Several of the scales were very low, e.g., trading across borders (182), paying taxes (165), starting a business (162), and dealing with construction permits (149) (see more details in Appendix Table 28). This relatively low doing business ranking signals some of the challenges of improving the economy and labour market's structures.

The Human Development Index (HDI) ranking Tanzania at low human development at 163 out of 189 countries (1 is best) in 2020. Inequality in the distribution of family income is measured in the Gini index. Estimations suggested that this inequality increased from 37.8 in 2011 to 40.5 in 2017 (0 represents perfect equality, while 100 represents high inequality).

The middle-class for those in employment experienced just a minor increase by three percentage points during the 2010s, reaching 11% in 2019. The workers living below US\$3.2 per day (aggregated extreme poor and moderately poor) fell by just seven percentage points in the same period, reaching 72% in 2019 (see details in Figure 2). These latter estimations excluded the economically inactive population, at 18% of the population's 15+ years. Based on the poverty headcount ratio at the national poverty line, the 2019 Tanzania Mainland Poverty Assessment registered that poverty fell from 34% in 2007 to 26% in 2018. It was one of the lowest rates compared to the neighbouring countries' national poverty line: Burundi (65%), Democratic Republic of Congo (64%), Kenya (36%), Malawi (52%), Mozambique (46%), Rwanda (38%), and Zambia (54%), except Uganda (21%). The rising inequality in the country reflected structural concerns: the economic growth benefits meagrely trickled down to the fast-growing population; no minimum wages increased since 2013, to say nothing of low social protection coverage (see more in Social Protection section). Estimations suggested loss of incomes could have pushed an additional 600,000 Tanzanians below the national poverty line in 2020, most of the households that rely on

self-employment and informal microenterprises in urban areas.⁵

Figure 2: Estimations of employment by economic class in Tanzania, 2010-2019



Note: Data in this table exclude the economically inactive population that cover around 18% of the population (aged 15+). Data in this table is measured at Purchasing Power Parity (PPP).

Sources: ILO, Key Indicators of the Labour Market (KILM).

Free Trade Zones

Export Processing Zones Act of 2002 in Tanzania Mainland opened to establish the Export Processing Zones (EPZ) programme. This scheme is promoting export-oriented manufacturing investment within designated zones to create international competitiveness for export. The Special Economic Zones Act was enacted in 2006 and established the similarly Special Economic Zones (SEZ) programme. The latter scheme stimulates multi-sectoral investment for both domestic and foreign markets. Eight SEZs are established by law: four EPZ, three SEZ, and one industrial park. There are also around 168 single-enterprise zones ("free points"); these schemes are set in 21 locations.⁶ Export Processing Zones Authority (EPZA) oversees EPZs/SEZs.

Incentives of EPZ/SEZ investments are linked to exemptions from payment of Value-Added Tax (VAT) and customs duties; withholding tax on rent, dividends, and interest for ten years; taxes and levies imposed by Local Government authorities; VAT on utility and wharfage charges (fee charged by the freight terminal on the passage of cargo or merchandise); pre-shipment inspection requirement; payment of withholding tax on interest on the foreign-sourced loan, among others. EPZ operators (who produce 100% for local supply) will no longer enjoy the 10-year corporate income tax holiday to create a fair playing ground for operators both within and outside the SEZ who produce local supply.

The number of EPZ/SEZ workers increased significantly from 38,000 in 2016 to around 52,400 in 2017 (July), equalled EPZ/SEZs' employment growth at 38%, reaching 1.5% of employees in 2017. EPZ/SEZs contributed to around 5% of national exports; the cumulative amount up to 2016 stood at US\$1.1 billion, an increase of US\$306 million from 2015. In 2012, the figure was around US\$357 million. According to a survey, the most frequently cited reasons for choosing to get a job in EPZ/SEZs concerned a better salary, working conditions, and social benefits. Average wages per month were TZS 390,000 (US\$179) in 2016.⁷

A study concluded that Tanzania's EPZ programme was falling behind, mainly due to rigid and expensive infrastructural aspects.⁸ Also, a high cost of operations based on the unreliable supply of electricity and water negatively affected the enterprises' competitiveness in the international markets.⁹ Another study revealed that EPZ/SEZs in Tanzania were highly disorganised. Many firms were non-operational, and it appeared that the EPZA did not have a good handling of how the SEZs were functioning in practice. The firms were overly burdened by red tape and bureaucratic procedures that added significantly to their cost structure and reduced their competitiveness (see more on Appendix Table 28). Accessing labour with the necessary skills moreover appeared problematic for firms located in Tanzania.¹⁰

Zanzibar updated its investment policy in 2019. The Zanzibar Investment Promotion Agency (ZIPA) and the Zanzibar Free Economic Zones Authority (ZAFREZA) offer Free Economic Zone incentives. As of 2018, Zanzibar had five Free Economic Zones, two of which were freeports.¹¹ Data are scarce on EPZ employees' scope and the protection of workers' rights in practice.

LABOUR LEGISLATION

Tanzania Mainland and the semi-autonomous Zanzibar have separate labour laws. International Labour Organisation (ILO) registered 306 labour-related legislation in May 2021, and few new laws/decrees were registered in recent years (see Appendix Table 24). One of the most major law reforms in recent years was the Public Service Social Security Fund Act from 2018. This bill improved that every employee or staff of the authority whose service is not transferred to a public office shall be paid terminal benefits by the applicable laws and regulations governing the terms and conditions of service immediately before the termination. Like many other countries, Tanzania's labour regulations did not

envisage a COVID-19 or similar situation that put many employers and workers in a challenging position.

The Permanent Constitution, also known as the Fourth Constitution of Tanzania, was ratified in 1977 and applied to the United Republic of Tanzania: Mainland Tanzania and Zanzibar. Several aspects are exclusive union matters concerning the division of powers between the Mainland and Zanzibar, reserved to the central government of a federation such as defence, currency, and foreign affairs.

The state is obliged to realise the right to work and receive social welfare. The freedom of association is guaranteed but with some restrictions. Equal opportunity and just remuneration are enshrined in the constitution, including exceptions for forced labour through compulsory national service.

Tanzania Mainland's and Zanzibar's complex relations are central in domestic politics, not least in the constitution's context. A constitution review process was initiated in 2013 and finalised in 2015. The participating trade union representatives ensured the inclusion of labour rights clauses in the new draft constitution. The constitutional referendum was planned for April 2015. However, heightening political tensions, delayed voter registration, and security sectarian postponed the process. Issues with concerns were mainly related to the division of Mainland and Zanzibar, ethnic relations, as well as ownership of oil and gas reserves. This review did not include the proposed Ministry of Constitutional Affairs 2017/2018 budget, raising a concern that the constitution review was never a priority for the current government.¹²

Tanzania Mainland

At the policy level, skills development, industrial, and revision of the Pension Act 2018 was in progress in recent years. The government aims to launch the National Internship Scheme to address the challenging youth unemployment on account of lack of experience. Graduates are offered internship programme for between six months and one year (see more in Unemployment sub-section). The status of central labour-related laws is summarised below.

Employment and Labour Relations Act¹³

Employment and Labour Relations Act (ELRA) of 2004 sets fundamental rights at work and regulates hours of work, remuneration, leave, termination of employment, trade unions and employers' organisations,

organisational rights, collective bargaining, strikes and lockouts, and sets dispute resolution under the Commission for Mediation and Arbitration. The labour laws cover all workers, including foreign and migrant workers. The right to freedom of association is strictly regulated. At the same time, ELRA did not stipulate a reasonable period for processing applications to register trade unions.

ELRA's reform in 2017 introduced improvements concerning child labour prohibition, employment standards, and trade union matters.

Labour Institutions Act¹⁴

Labour Institutions Act of 2004 applies to the United Republic of Tanzania. It establishes the tripartite institutions: Labour, Economic and Social Council (LESCO), Commission for Mediation and Arbitration (CMA), Essential Services Committee (ESC), Sectoral Wage boards, Prime Minister's Office – Labour, Youth, Employment and Persons with Disabilities' (PMO-LYED) Labour Administration and Inspection Section, and the Labour Court. In 2017, newly appointed members to the LESC, CMA, and Wage Boards were approved. The amended Act in 2017 also changed Wage Board consultation and Wage Order Review within three years from the date of issue (see more in Social Dialogue section).

Zanzibar

Zanzibar operates with a series of employment policies, youth employment, minimum wages, poverty reduction, industrial, small- and medium enterprises, cooperative, agricultural, trade, and education at the policy level.¹⁵ Zanzibar also took one step closer to launching the Apprenticeship Policy in March 2020. The status of central labour-related laws is summarised below.

Labour Relations Act¹⁶

Labour Relations Act of 2005 regulates fundamental employees' rights, establishes the framework for registration of trade unions and employers' organisations, organisational rights, collective bargaining and agreements, labour disputes and right to strike, dispute prevention, and resolution and establishes the Zanzibar Industrial Court.

The law requires any union with 50 or more members to be registered, a threshold few companies could meet (see more in Ratified ILO Conventions sub-section). It also sets literacy standards for trade union officers. The law provides the registrar considerable powers to restrict registration by setting forth criteria for determining

whether an organisation's constitution contains suitable provisions to protect its members' interests. The law applies to public and private-sector workers and bans Zanzibari workers from joining labour unions on the Mainland. The law prohibits a union's use of its funds, directly or indirectly, to pay any fines or penalties incurred by trade union officials in the discharge of their official duties. In Zanzibar, both government and private-sector workers have the right to strike if they follow procedures outlined in the labour law. For example, workers in essential sectors may not strike; others must give mediation authorities at least 30 days to resolve the dispute and provide 14-day advance notice of any proposed strike action.¹⁷

The Employment Act

Employment Act from 2005 regulates fundamental rights and protection, employment procedures and foreign employment, contracts of service and employment standards and rights (hours at work, wages, leave, vacation, penalties, termination of employment, etc.). The law also establishes the Labour Advisory Board, wage-fixing machinery, wages protection, and the Labour Commission and Labour Inspection Section.

Observations on labour legislation

International Trade Union Confederation (ITUC) registered Tanzania's labour legislation on the rights of freedom of association, the rights of collective bargaining, and the rights of strikes with flaws to the international standards:¹⁸

- The law prohibits anti-union discrimination but does not provide adequate means of protection against it.
- Power to refuse official registration on arbitrary, unjustified, or ambiguous grounds.
- Excessive representativity or a minimum number of members required for the establishment of a union.
- Sanctions imposed for organising or joining an organisation not officially recognised.
- Restrictions on trade unions' right to establish branches, federation, and confederation or affiliate with national and international organisations.
- Restrictions on the right to elect representatives and self-administer in full freedom.
- Administrative authorities' power to unilaterally dissolve, suspend or de-register trade union organisations.

- Compulsory conciliation and/or binding arbitration procedure in the event of disputes during collective bargaining, other than in essential services.
- Excessively long prior notice/cooling-off period.
- Absence of specific protection for workers involved in lawful strike actions (e.g. against dismissal).
- Restrictions for the objective of a strike (e.g. industrial disputes, economic and social issues, political, sympathy and solidarity reasons).

The Sustainable Development Goal's indicator 8.8.2 seeks to measure the level of national compliance with fundamental labour rights: freedom of association and collective bargaining (FACB). Based on ILO textual sources and national legislation, Tanzania ranked at 1.77 from 2015 to 2017 (0 out of 10; 0 is best). Compared to neighbouring countries, the ranking is a medium level (see more details in Table 2).

Table 2: Level of national compliance with labour rights (freedom of association and collective bargaining) among Tanzania and neighbouring countries, 2016-2018

Country	Value
DR Congo	3.34
Malawi	0.37
Mozambique	2.00
Tanzania	1.77
Uganda	1.46
Zambia	2.21

Note: The value has a range from 0 to 10, with 0 being the best possible score (indicating higher levels of compliance with FACB rights) and 10 the worst (indicating lower levels of compliance with FACB rights based on ILO textual sources and national legislation).

Sources: ILO, Key Indicators of the Labour Market (KILM).

Other aspects are that the government did not effectively enforce the law protecting the rights to collective bargaining. Some private-sector employers adopted anti-union policies or tactics on both the Mainland and Zanzibar, although discriminatory activities by an employer against union members are illegal. Trade Union Congress of Tanzania (TUCTA) claimed that international mining interests bribed government officials to ignore workers' complaints and write false favourable reports on mines' work condition.¹⁹

The informal economy is widespread marred by not following labour and business regulation in practice, primarily due to lack of awareness or incentives (see more in Informal Economy sub-section). It gives a reflection that labour legislation's coverage is largely void.

Ratified ILO Conventions

International principles and rights at work are enumerated in international conventions. Tanzania ratified 37 conventions: 30 of them are in force, two have been denounced, and five instruments abrogated. The latest ratified conventions were the Maritime Labour Convention, 2006 (MLC, 2006) in 2019 and the Seafarers' Identity Documents Convention (Revised) (No. 185) from 2017.

The list in Appendix Table 27 shows that Tanzania ratified the eight fundamental conventions and one of the Governance Conventions: Tripartite Consultation Convention (C144), leaving out the two labour inspection conventions and the Employment Policy Convention. The country also ratified 28 Technical Conventions out of which 13 are Up-To-Date and actively promoted.

The independent ILO body, known as the Committee of Experts on the Application of Conventions and Recommendations (CEACR), forwarded a series of observations and direct requests to central conventions for Tanzania. For example, concerning the Equal Remuneration Convention (C100), the committee noted with concern that men earned significantly more than women and urged the government to provide information on the proactive measures taken to address the gender wage gap, both in the public and private sectors. The application of the Discrimination (Employment and Occupation) Convention's (C111) standards also made CEACR urged the government to address without delay discriminatory advertising and hiring practices to eliminate gender stereotypes, including stereotyped assumptions by employers of women's or men's suitability for specific jobs (see more in Gender sub-section).

CEACR listed observations dealing with bringing the Employment and Labour Relations Act into conformity with the Freedom of Association and Protection of the Right to Organise Convention (C087). The committee noted that Zanzibar's Labour Relations Act does not refer to the absolute majority and cannot be understood as imposing a 50% threshold for an organisation to be authorised to engage in collective bargaining. They requested the government to take the necessary measures to remove any ambiguity concerning the meaning of the term "majority" and clarifying that the most representative trade union shall have an exclusive right to bargain with the employer in line with the Right to Organise and Collective Bargaining Convention (C098). Additionally, CEACR requested the government amend several provisions to bring the bill into full conformity with the Freedom of Association and

Protection of the Right to Organise Convention (C087). For example, several categories are governed by their laws but are not excluded from the right to organise. Trade unions should have the power to manage their funds without undue restrictions from the legislation; the prohibition of the right to strike in the public service should be limited to public servants exercising authority in the name of the state or essential services in the strict sense of the term, that is services the interruption of which would endanger the life, personal safety, or health of the whole or part of the population.²⁰

Trade Agreements

Trade agreements, including labour provisions, are on the rise and becoming progressively more accepted. Studies argue, though, that the measures of labour conditions (i.e., mean real monthly earnings, mean weekly work hours per employee, fatal occupational injury rate, and the number of the ILO's Fundamental Conventions ratified) find no evidence for possible pro-labour-condition effects of Regional Trade Agreements (RTA) labour clauses overall.²¹

Tanzania has been a member of the World Trade Organisation (WTO) since January 1995. The latest review of the trade policies and practices took place in March 2019.²² Three dispute settlement cases as a third party involved in Tanzania.²³ The country's binding coverage of WTO Tariff Commitments is one of the lowest among LDCs, at 16%. The Agreement on Subsidies and Countervailing Measures (SCM Agreement) addresses two separate but closely related topics: multilateral disciplines regulating the provision of subsidies and the use of countervailing measures to offset the injury caused by subsidised imports. Some argue that since WTO rules prohibit the export subsidies granted by EPZs, and should eventually be phased out. Nevertheless, EPZs are continuing to expand throughout the world and are likely to continue to exist. Article 27 of the SCM Agreement excludes the least developed countries (LDCs) from the prohibition on export subsidies, understood as those WTO members that fall within the United Nations definition of LDCs, including Tanzania.²⁴

Tanzania has four regional trade agreements in force: Common Market for Eastern and Southern Africa (COMESA), East African Community (EAC), Global System of Trade Preferences among Developing Countries (GSTP), and Southern African Development Community (SADC).

EAC established a customs union in 2005 and agreed to establish a complete, common market with free movement for workers, goods, services, and capital in 2010. The agreement contains labour provision with cooperation on employment and working conditions with an emphasis on gender equality, as well as discriminatory law and practices. Freedom of association and collective bargaining is enshrined in the EAC common market regarding that an EAC migrant worker has the same rights as a citizen.²⁵ The free movement of labour within the EAC raises questions of how to achieve equal opportunities and equal social and labour rights for migrant workers, for example, if workers can bring pensions across borders. The free movement of labour is a source of concern in some of the EAC countries, as the countries' workforces have differences in productivity and educational level. The actual economic integration implementation slowed down the last few years, especially lifting trade barriers and the free labour movement. Labour provision of COMESA agreement also extends to cooperation on employment conditions and labour law.²⁶

The 2000 Cotonou Agreement set the framework for European Union (EU) relations with African, Caribbean, and Pacific (ACP) countries. It is the most comprehensive partnership agreement between developing countries and the EU, covering the EU's relations with 79 countries, including 48 countries from sub-Saharan Africa, involving Tanzania. The Cotonou Agreement aims to reduce and eventually eradicate poverty and contribute to the gradual integration of the ACP countries into the world economy. It is based on three pillars: development cooperation, economic and trade cooperation, and political dimension. The agreement reaffirms commitment to ILO's fundamental conventions and collaboration on various labour and social issues. Application to the Cotonou Agreement was extended to December 2020, and negotiation on the future deal has been in progress. The negotiations work towards a substantially revised agreement with a common foundation at the ACP level combined with three regional tailored partnerships for Africa, the Caribbean, and the Pacific. The future deal expects to cover priority areas such as democracy and human rights, economic growth and investment, climate change, poverty eradication, peace and security, and migration and mobility.²⁷ Tanzania is already beneficiary to the EU's Generalized System of Preferences (GSP) in the Everything but Arms (EBA) scheme where all imports to the EU from the LDCs are duty-free and quota-free, except for arms and ammunition.

Tanzania is eligible for the United States' African Growth and Opportunity Act (AGOA). It also qualifies for textile and apparel benefits.

Tanzania is a member of both the International Centre for Settlement of Investment Disputes (ICSID) and the Multilateral Investment Guarantee Agency (MIGA). Tanzania is a signatory to the New York Convention on the Recognition and Enforcement of Arbitration Awards.

SOCIAL PARTNERS

Social partners are essential to promote the realisation of core labour rights and social justice for workers by protecting freedom of association and collective bargaining in bi- and tripartite functions. These partners are usually represented as the central government institutions, trade unions, and employers' organisations.

Government

Prime Minister's Office – Labour, Youth, Employment and Persons with Disabilities (PMO-LYED) can be traced back to when the country got independence in 1961 and was reshuffled several times. The latest change was the Ministry of Labour and Employment (2010 to 2015) entered as PMO-LYED (2015 to date). The ministry is divided into sixteen directorates/units:²⁸

- Labour Division split into Labour Relations Section, Labour Administration and Inspection Section, and Work Permits Section.
- Employment and Skills Development Division divided into Employment Promotion Section, Skills Development Section, and Labour Market Information Section.
- Youth Development Division divided into Youth Coordination and Mobilization Section and Youth Upbringing, Guidance and Counseling Section.
- Social Protection Division divided into Social Insurance Section and Social Assistance Section.
- Persons with Disability Unit.
- Trade Union and Employers' Association Registration Unit.
- Employment Service Unit.
- Administration and Human Resource Management Division split into Administration Section and Human Resource Management Section.
- Policy and Planning Division functions in the Policy and Planning Section and Monitoring and Evaluation Section.
- Finance and Accounts Unit.

- Internal Audit Unit.
- Procurement Management Unit.
- ICT and Statistics Unit.
- Legal Services Unit.
- Government Communication Unit.

Revolutionary Government of Zanzibar's Ministry of Labour, Empowerment, Elders, Women and Children is functioning.

Other central ministries related to the labour market's development are the Ministry of Health, Community Development, Gender, Elderly and Children, and the Ministry of Health, Community Development, Gender, Elderly and Children, both also encompasses Zanzibar.

Trade Unions

Trade unions' history in Tanzania traces back to the 1920s. Divided laws administrate Tanzania Mainland and Zanzibar, including Trade Union Congress of Tanzania covers Tanzania Mainland, while Zanzibar Trade Union Congress for Zanzibar.

Tanzania Mainland

Trade unions in the private sector must consist of more than 20 members and register with the government, while public-sector unions need 30 members. Five organisations are required to form a federation. Trade union affiliation with non-union organisations can be annulled by the Labour Court if obtained without government approval or if the union is considered an organisation whose remit is broader than employer-worker relations. A trade union or employers association must file for registration with the Registrar of Trade Unions in the Ministry of Labour within six months of establishment. The legislation does not provide for specific time limits within which the government must register an organisation, and the registrar has the power to refuse registration on arbitrary or ambiguous grounds. The government prescribes the terms of office for trade union leaders. Failure to comply with government requirements is subject to fines, imprisonment, or both.²⁹

There were registered 13 trade unions in Tanzania Mainland. Around 860,000 workers were affiliated members of the Trade Unions Congress of Tanzania (TUCTA) in 2019, estimated trade union density at 19% among employees; only 3.2% of total employment. Data for 2020 were scarce, but since employments freeze-up, salary cut-off and retrenchments directly affected unionism. Three out of

five members (62%) were women, and around 3.3% were organised workers from the informal economy (see Table 3).

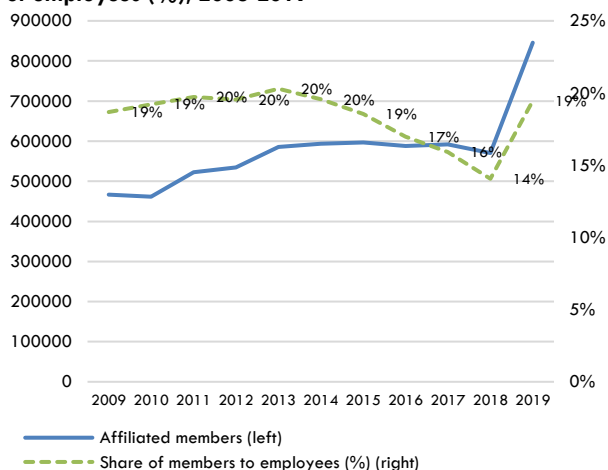
Table 3: Status of unionism in Mainland, 2019

Number of trade unions	23 *
Members of trade unions	860,000 **
Membership growth, 2010-2019	83 %
Women members of trade unions	62 % ***
Trade union density (employment)	3.2 %
Trade union density (employees)	19 %

* Aggregating 13 TUCTA unions and 10 independent unions. ** Estimation of independent unions membership rate is underestimated (see more in Appendix Table 25). *** TUCTA's estimations. Source: TUCTA; own calculations on trade union density based on ILO's employment projections.

The membership rate grew by 83% from 2010 to 2019: it initiated at the beginning of the 2010s, got stalled during 2014-2018, but rose rapidly in 2019, which caused a rapid enrolment of organised teachers. This progress was outpaced by the fast-growing workforce during the 2010s: the current trade union density of employees was lower than the peak in 2013 (Figure 3).

Figure 3: TUCTA's membership rate and trade union density of employees (%), 2008-2019



Source: TUCTA; own calculations on CBAs coverage and share of employees based on data from ILO's projections.

Across sub-sectors, employees in central and local government have the highest proportion of trade union members (81%), followed by parastatal organisations (63%). Both had a small share of employment from the total employment. In contrast, the private sectors have much smaller proportions of trade union members marred by the widespread informal economy dominated of micro, small, or medium enterprises (see more in Table 4 and Workforce section).

Table 4: Paid employees with membership in trade unions or employees' associations in Tanzania Mainland, %, 2014

Sector	%
Central and local government	81 %
Parastatal organisations	63 %
Private sector (agriculture)	1.1 %
Private informal economy	1.6 %
Private sector (non-agriculture)	16 %
Household duties	27 %
Total	27 %

Source: Tanzania National Bureau of Statistics, Integrated Labour Force Survey from 2014.

The relatively low trade union density weakened private-sector workers' bargaining power compared to those from the public sector. Besides, the liberalisation processes gradually reduced the public sector's leading role in economic production. The public sector payroll for "ghost workers" was cleaned up in 2016, pushing many workers dismissed without terminal benefits because of their illegal existence in employment, and application of casualisation of employment contracts were on the rise. These aspects stymied the membership rate. Besides, Mainland's trade union movement has not prioritised to affiliate organised workers from the informal economy. In contrast, neighbouring countries have experienced a massive influx of affiliated organised workers from the informal economy in recent years.³⁰

Trade Unions Congress of Tanzania (TUCTA)

TUCTA was established in 2001 under the Trade Unions Act of 1998, and it is the sole national trade union federation in Tanzania Mainland. The organisation is recognised as a player in the social dialogue and tripartite institutions. TUCTA has ties to the government and regular meetings with state institutions, additionally affiliated with the International Trade Union Confederation (ITUC).

The latest election process concluded in November 2016. One out of three (36%) were women and 8% below 30 years (men/women) in leadership positions and decision-making bodies. The congress operates with gender and youth policies/strategies as well as formal gender/youth committees. TUCTA's next election will be conducted before the end of 2021.

TUCTA registered thirteen trade unions that represented close to 846,000 affiliated workers in 2019. Ten relatively new independent unions are also operating, representing around 14,000 workers as a minor group at 2.3% of the total trade union membership rate.

TUCTA's members' shares are concentrated in the central and local government and parastatal organisations by

81% and 63%, respectively: Half (50%) of TUCTA's members is concentrated in Tanzania's Teacher Union (TTU). A massive inflow of organised teachers drove the significant rise of TUCTA's membership in 2019: TTU's members increased from 244,612 in 2018 to 419,028 in 2019, equalled a growth of 71%. It furthermore boosted members' CBA coverage (see more in Social Dialogue section). Tanzania Union of Industrial and Commercial Workers (TUICO) also experienced an upsurge in membership. It increased 35% from 2016 to 2019, reaching almost 99,000 workers and mainly from an upsurge of affiliated organised workers from the informal economy. Two more trade unions – the Tanzania Social Services Industry Workers Union (TASIWU) and the Tanzania Union of Private Security Employees (TUPSE) – are underway to join TUCTA. Appendix Table 25 provides more details of the affiliated trade unions membership.

TUCTA has relatively few affiliated organised workers from the informal economy, at approximately 1.1% in 2019. The organisation has elaborated upon a strategy on how to engage in the informal economy.

Zanzibar

In Zanzibar, labour issues' concerns were neglected for years, until 2001, the Zanzibar's House of Representatives enacted the Zanzibar Trade Union Act, which allowed trade unions to register. The national trade union centre was established in 2003, branded as Zanzibar Trade Union Congress (ZATUC). This organisation covers all trade unions in Zanzibar.

A more extensive merger process of trade unions in the public sector reduced the number of affiliates from eleven to eight in 2020; fusions in the private sector are in progress. Estimating trade union density of employment was 2.4% and employees of 18% in 2020 (Table 5).

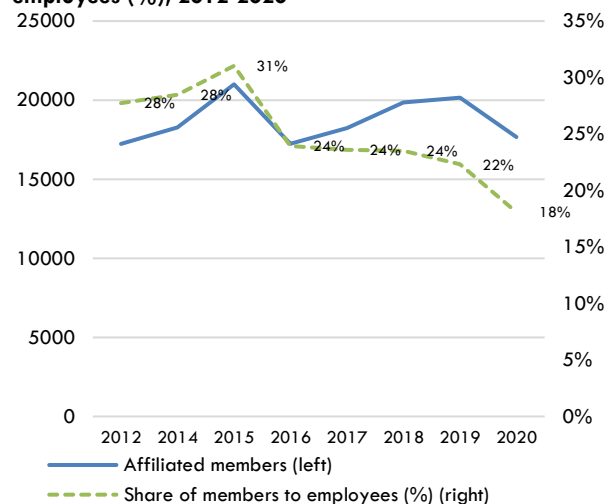
Table 5: Status of unionism in Zanzibar, 2020

Number of trade unions	8
Trade union membership	17,672
Membership growth, 2019-2020	-12%
Women's share	38%
Trade union density (employment)	2.4 %
Trade union density (employees)	18 %
Share of affiliated members from the informal economy	5.9 %

Source: ZATUC; own calculations on trade union density and membership growth.

In 2015, it became obligatory that trade union members pay contributions; those who were not became excluded. As a result, the membership dropped from 21,000 in 2015 to 17,000 in 2016, costed a drop of 18%. The membership rate rebounded afterwards, reaching slightly more than 20,000 in 2019, but plummeted in 2020 as an impact of the COVID-19 due to closed workplaces, exercised job cuts, redundancy, and contracts terminations (Figure 4).

Figure 4: ZATUC's members and trade union density of employees (%), 2012-2020



Source: ZATUC; own calculations on CBAs coverage and share of employees based on data from ILO's projections

Zanzibar Trade Union Congress (ZATUC)

ZATUC became gradually recognised with increased influence in decision-making on the labour market, conducting negotiations and signing collective agreements. The organisation is also part of the President's task team on Covid-19. The ITUC affiliates ZATUC.

To promote a higher influx of members, ZATUC adopted a strategic plan. A national union committee was set up with an informal economy desk in 2015 that functions to affiliate organised workers from the informal economy. Paying required trade union contributions for all was a central issue for unionism. Some workers from the informal economy were successfully organised in associations, paying a flat rate at around 500-1,000 shillings (equivalent to US\$0.2-0.4) per month, and enjoyed a proportional representation, by trade unions. Only 6% of all members were affiliated workers from the informal economy but slowly on the rise (Table 5). Due to the COVID-19 pandemic, ZATUC lost members in the hospitality, transport, service industries and the informal economy in 2020.

ZATUC's constitution gives equal gender equality, but it is not a compulsory 50% for women to be leaders. Data revealed that 73 out of 170 positions (43%) in leadership positions and decision-making bodies were women and 22 posts (13%) among young leaders in 2020. According to ZATUCs' register, two out of five (41%) of members were women.

Around one out of two public teachers were members of the Zanzibar Teachers' Union (ZATU), and they represented ZATUC's highest share at 34%. Regionally, ZATU is active in the federation for East African Teachers' Unions (FEATU) that recently gained legal registration in Tanzania. This organisation is in the process of finalising the establishment of a permanent office in Arusha and receiving official observer status in the East Africa Community (EAC) in line with the East African Trade Union Confederation (EATUC) but only on issues on teachers' rights and education matters. The second-largest affiliated union in ZATUC is the Zanzibar Seafarers Union (ZASU), with a share of 13%. See more details in Appendix Table 26.

Employers' Organisations

Based on ILO's projections, employers represented 2.8% of Tanzania's employment in 2020 (see Figure 8 ahead). The Global Competitiveness Index provides the Tanzanian employers' view on a wide range of aspects, including labour market efficiency. The latter is elaborated upon surveys among employers and other statistical data. This labour market efficiency ranked Tanzania at 86 out of 141 countries (1st is best).³¹ Out of twelve indicators, the highest-ranking was redundancy costs (cost in weekly wages of advance notice requirements, severance payments, and penalties due when terminating a redundant worker) at 25, followed by reliance on professional management at 60. The worst rankings were ease of hiring foreign labour (130) and flexibility of wage determination (104). In the light of cooperation in labour-employer relations was at medium-level, ranking 77 (see more in Table 6).

Table 6: Labour market efficiency in Tanzania, 2019

Indicator	Rank
Total	86
Redundancy costs (weeks of salary) **	25
Hiring and firing practices *	68
Cooperation in labour-employer relations *	77
Flexibility of wage determination *	104
Active labour market policies *	69
Worker's rights *	70

Ease of hiring foreign labour *	130
Internal labour mobility *	88
Reliance on professional management *	60
Pay and productivity *	87
Ratio of wage and salaried female workers to male workers **	99
Labour tax rate **	73

* Survey data. ** Ranked by per cent.

Note: Rank from 1 to 141 (1 is highest).

Source: The Global Competitiveness Report, 2019, 8th pillar: Labour market efficiency.

Employers have the right to initiate a lockout, providing they comply with certain legal requirements and procedures.

Tanzania Mainland

The Association of Tanzania Employers (ATE) was formed in 1960 and is the central institution representing the organised employers' interests. The organisation affiliates employers in all sectors, excluding the civil service. ATE's direct members grew from 1,300 in 2015 to 1,400 at the end of the 2010s, and indirect members from 6,000 to 7,500, drawn from private business firms, companies, and some parastatal organisations.

ATE registered several local partners, including as tripartite partner to Prime Minister's Office and TUCTA; regionally, affiliated to SADC Private Sector Forum (SPSSF), East African Business Council (EABC), Founding member of the East African Employers Organisation (EAEO), and East African Business Council (EABC); and internationally, International Organisation of Employers (IOE), Confederation of Norwegian Enterprise (NHO) and China Enterprise Confederation (CEC), among others.³²

Most members were based in Dar es Salaam (70%), and the rest were in other parts of the Mainland (30%). The members were classified into ten divisions: agriculture, oil and gas, banking and financing, mining and construction, commerce and trade, transportation and communication, hospitality and tourism, industries and manufacturing, social services, and private security.

ATE's main objective is to enhance sustainable socio-economic development in coordination with the government and trade union movement. The association provides advice and representation for services of industrial relations, law, management to its members. It is governed by an annual general meeting and an executive council, as well as with representatives in the most central bi/tripartite organs.

ATE advised on measures that employers could take in response to the ongoing COVID-19 crisis and published a Circular that advises what employers need to know about the pandemic and employment law and the possible precautions.³³

Zanzibar

Employers' Association of Zanzibar (ZANEMA) was established in 1998 to advance employers' interests and influence policy and good practices related to industrial relations, employment, and the business environment. Data were scarce on the organisation's affiliated members. ZANEMA has good working relations with ZATUC. The organisation faces constraints in terms of manpower resources, though. ZANEMA is a member of the East African Employers Organization (EAEO).

SOCIAL DIALOGUE

Social dialogue encompasses all types of negotiation, consultation, or exchange of information between representatives of social partners on common interest issues relating to economic and social policy. It can be informal or institutionalised, and often it is a combination of the two. It can take place at the national, regional or enterprise level.³⁴

Organised employers and workers are represented in many essential forums, including the International Labour Conference (ILC) and ILO's complaints procedures. Tanzania ratified ILO's Tripartite Consultation Convention (C144) back in 1983 and the Collective Bargaining Convention (C154) in 1998. The country also ratified the Human Resources Development Convention (No. 142) in 1983 that calls for consultations with social partners in developing vocational training programmes (revisit Appendix Table 27). Reports argue that the government did not effectively enforce the law protecting the right to collective bargaining.³⁵

Bi- and tri-partite social dialogue mechanisms and institutions go back for many decades. While certain industrial relations' systems allow workplace cooperation to be established voluntarily in Tanzania, these must be formed at the request or with trade unions' approval. During the 2010s, social partners' interaction improved these mechanisms and processes: Several bi- or tri-partite joint guidelines/codes of good conduct and Memorandum of Understanding (MoUs) were launched. It led to conflict resolution committees at the workplace level to solve conflicts among employers and workers, reducing risk escalating.³⁶ Social dialogue is also applied to tackle child labour, not to mention consulting

in the Pay-As-You-Earn (PAYE) review for all workers and discussing the harmonisation of the pension formula is in progress.

Tanzania Mainland

Although the legal framework for social dialogue in Tanzania Mainland is set, it is still limited in practice and often ineffective. It is mostly due to weak enforcement mechanisms, fragile and some dormant social dialogue institutions, and overloaded dispute resolution mechanisms. It has contributed to some complications and contentious labour relations. A survey undertaken by ATE detected that employers not fully embraced the possibilities of collective bargaining, which is likely to be the same for the employees. It is often interrelated to a lack of awareness or incentives. Nevertheless, social dialogue has some improvements. Trade unions and the employers' organisation were undergoing joint activities such as bipartite meetings in recent years; and several tripartite meetings on how the reformed Social Security Fund scheme should operate.

Collective bargaining agreements must be registered with the Labour Commission. Public-service employees, except for limited exceptions, such as workers involved in "national service" and prison guards, may also engage in collective bargaining. Public-sector employees have the right to bargain collectively through the Trade Union of Government and Health Workers (TUGHE). TUGHE conducts negotiations with the government through workers' councils that are conducted regularly. These councils are established with public departments or institutions in about 98% of the government workplaces. Workers' councils discuss different agendas, including salary increase, financial regulations, and human resources policies. Whatever is agreed and signed in the workers' councils, they become the Collective Bargaining Agreements (CBAs). It becomes enforceable by the law. Not all public sector employees have the right to bargaining collectively through TUGHE, though, because it depends on the public institutions, e.g., local government employees have their union, organised under Tanzania Local Government Workers Union (TALGWU), and parastatal organisations are under TUICO such as TANESCO, NSSF, TANTRADE, SIDO, Water Utilities Authority, consultant organisations companies and Banking sector.

There are some legal flaws in the rights to collective bargaining concerning international standards. The legislation is less prescriptive and provides minimum requirements that widen the spectrum for employers and

employees to negotiate the terms and conditions of employment, as well as agree on work standards. ITUC has additionally registered the right to collective bargaining is recognised by law but strictly regulated (revisit Observations on labour legislation sub-section).³⁷ Besides, Tanzania Mainland's labour regulations voided unpaid leave as a working arrangement option. The unprecedented times triggered by the COVID-19 pandemic challenging businesses' financial strains, the employer and employee may engage in dialogue regarding an unpaid leave arrangement. The employee must agree to this arrangement, and the employer should not unilaterally arrive at such a conclusion. Failure to consult an employee may lead the employee to file an unfair termination claim at the Commission for Mediation and Arbitration (CMA) (see more ahead).

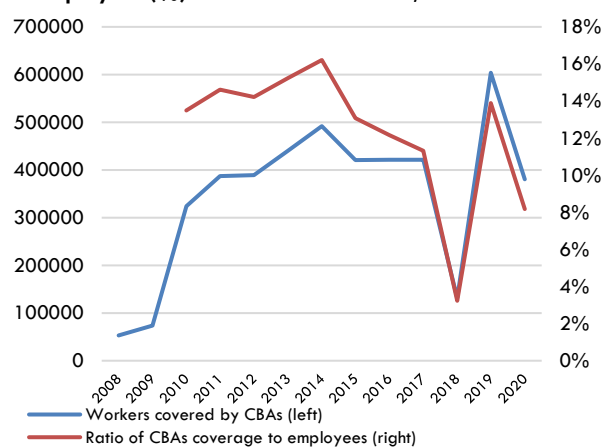
According to TUCTA's register, 416 CBAs were listed in 2020. Workers covered by CBAs was on the rise during the 2010s, except for a downturn in 2015 and especially in 2018. CBAs' coverage peaked at around 604,000 workers in 2019, with the employees' share of 14%, but fell in 2020 (see more on Table 7, Figure 5, and Appendix Table 25).

Table 7: Status of Collective Bargaining Agreements (CBAs) in Tanzania Mainland, 2018-2020

	2018	2019	2020
Number of CBAs	444	444	416
Workers covered by CBAs	135,145	603,772	380,609
Ratio of CBAs coverage to employees	3.3%	14%	8.2%
Ratio of Cas coverage to employment	0,5%	2,3%	1,4%

Source: TUCTA; own calculations of CBAs' shares based on ILO employment projections.

Figure 5: Number of workers covered by Collective Bargaining Agreements (CBA) and ratio of CBAs coverage to employees (%) in Tanzania Mainland, 2008-2020



Source: TUCTA; own estimation of ratio of CBAs to employees based on data from ILO employment projections.

Research of CBAs from eleven developing countries, including eight from Africa, counting Tanzania, showed that the country's surveyed CBAs enclosed wage clause, but few with pay scale or wages tied to skills, not to mention few with employer contributions to disability fund and none with unemployment fund. These CBAs are more frequently introducing standard sickness and disability as well as health/medical assistance clauses. Concerning Tanzania's CBA clauses on working hours coverage are below Kenya's scope but superseding Uganda's. In Tanzania, the paid leave clause was introduced to three out of four CBAs while just one out of two regarding paid maternity leave clause; one out of ten about the childcare clause.³⁸

TUCTA reported that employers discouraged workers from collective bargaining and retaliated against workers' rights activists via employment termination and other measures.

Tripartite institutions in Tanzania Mainland

Several tripartite institutions are functioning in Tanzania Mainland and the leading institutions' status is summarised below.

Labour, Economic and Social Council

By law, Labour, Economic and Social Council (LESCO) advises the Prime Minister's Office – Labour, Youth, Employment and Persons with Disabilities (PMO-LYED) on the national labour market policy and additionally any proposed labour law before it is submitted to cabinet. It furthermore collects and compiles information and statistics relating to the administration of labour laws. LESCO operates with an independent chairperson and sixteen members, all appointed by the mentioned minister, representing the government, employers, and workers, and four members selected because of their expertise.

Tripartite meetings in LESCO delivered occasional consultations, including in 2020 to tackle impact of Covid-19 pandemic. Although the dialogue could lead to recommendations, these were often not acted upon by the government in practice. For example, LESCO has recommended ratification of the ILO Convention 189 on domestic workers, but it has not yet been realised.

Essential Services Committee

The Essential Services Committee (ESC) comprises representatives from the government, employers, and workers. It functions with several aspects: i) to monitor the implementation and observance of essential services

determinations, minimum services agreements, maintenance services agreements and determinations; ii) to promote effective dispute resolution in essential services; iii) to develop guidelines for the negotiation of minimum services agreements; and iv) to decide, on its own initiative or at the reasonable request of any interested party, whether or not the whole or a part of any service is an essential service.³⁹

The ESC may designate a service as essential if the interruption of that service endangers the population's safety or health or any part of it. ILO's CEACR previously submitted observations to the government regarding Convention No. 87 which included the ESC had not made any decisions about classifying any additional services as essential. Also, workers in certain "essential" sectors may not strike without a pre-existing agreement to maintain "minimum services." ESC may only determine a service as essential when it can show that an interruption of that service would "endanger the life, personal safety or health of the whole or any part of the population." Workers in other sectors may be subjected to strike limitations determined by the ESC. This committee has the authority to deem services as essential periodically.⁴⁰

Sectoral Wage Boards

The Minister of Labour appoints the members of the Wage Boards in consultation with LESCO. The labour minister's office is under the Prime Minister's office. The Wage Boards' functions include: i) investigate on a minimum remuneration and other conditions of employment; ii) promote collective bargaining between registered trade unions, employers and employers' associations; and iii) make recommendations to the mentioned minister on minimum wages and conditions of employment.

The latest minimum wages were set back in 2013 based on thirteen sectoral levels, e.g., trade, industries and commercial; agricultural; private schools; mining, and health. Since no new minimum wages were reached since 2013, wage bargaining forums were either weak or non-existent in practice. Legal reforms in 2017 decided to bring only two Minimum Wage Boards: One for private employees and the second for public employees. Wage orders shall be reviewed within three years from the date of issue; provide for a more favourable wage, allowances terms, and employment conditions to be negotiated annually between employer and employees at the workplace or any level in the respective organisation. The government sets wages for government and state-owned organisations employees with some limitations on collective bargaining.

Other bi/tripartite organs

- Workman Compensation Body.
- Work Permit Board.
- Vocational Training Board.
- Tanzania Commission for AIDS.
- National Social Security Board (NSSF).
- National Health Insurance Fund Board (NHIF).
- Public Pension Fund.
- Regulatory Board for Social Security.
- Joint Assistance Strategy.
- Negotiation machinery at the Joint Staff Council (central) and at the Master Joint Staff Council.
- Teacher Education Quality Task Force, EFA Committee.
- Education Sector Advisory Council.
- Education Sector Master Workers Council.
- Board of the Vocational Education & Training Authority (VETA).
- The Ministerial Advisory Board.

Dispute settlement in Tanzania Mainland

Labour disputes are mainly regulated and resolved by mediation or arbitration through the Labour Commission for Mediation and Arbitration (CMA). It is an independent department of the Ministry of Labour that operated since 2007. CMA has 20 field offices with two arbitrators/mediators per field office on average.

Mediate or arbitrate embrace any dispute within the labour laws framework, including antiunion discrimination. The institution has been challenged by inefficient awareness of how Workers' Council contract should be formed and registered; failure to update the contract when it expires; and employees' organisational rights are often denied in the private sectors. Besides, legal processing cases do not respect or recognise CMA jurisdiction concerning labour matters involving defamation.⁴¹ For example, a labour dispute case over the termination of employment for bribery allegations went all the way up to High Court in 2016. It was faulted by the Court of Appeal, which ordered a fresh hearing after noting some inadequacy in the employment laws. It allowed CMA services and notifications to the parties' dispute and enabled them to take appropriate measures in case of any grievance, i.e., uncertainty is not conducive to timely adjudication of labour disputes.⁴² The Court of Appeal issued a judgement in March 2020 as to the parties' rights and option to contractually agree on a specific forum to adjudicate any dispute. The decision confirms that the parties to a contract can decide on a

forum and choice of law for determining their contractual disputes.⁴³

CMA received 8,279 cases from 2016 to 2019. Table 8 below shows the number of cases rose significantly in 2018 and 2019.

Table 8: Number of cases in the Commission for Mediation and Arbitration in Tanzania, 2016-2019

Year	2016	2017	2018	2019
Total number of cases	1,560	1,688	2,401	2,630

Source: Commission for Mediation and Arbitration in Tanzania 2020, compiled by DTDA.

Labour Institutions Act from 2004 established the Labour Court in Tanzania Mainland as a division of the High Court. The former court is presided by a judge and two assessors from the employers' organisations and trade unions. The institution is implementing procedures for settling its referred labour disputes. The Labour Court has struggled with a lack of resources and processing slightly less than half of the cases it receives.⁴⁴

Labour inspectors are often hindered in ensuring labour law compliance about sanctioning an employer through the courts. It often related to cumbersome processes depending on the seldom-used delegation of prosecutorial authority from the Director of Public Prosecutions (see more in Working Conditions section).⁴⁵

Zanzibar

Labour regulations provide for collective bargaining in the private sector. Public-sector employees also have the rights to bargain collectively through the Government and Health Employees Trade Union; however, the police force and prison service and high-level public officials are barred from joining a trade union. Zanzibar's Dispute Handling Unit addresses labour disputes. Judges and all judicial officers, members of special departments, and employees of the House of Representatives are excluded from labour law protections.⁴⁶

Social dialogue is still limited in practice and with some ineffectivity. For example, managerial employees do not have the right to bargain collectively for salaries and other employment conditions.⁴⁷ Be as it may, several bipartite meetings between ZUTAC and ZANEMA dealing with National Negotiation Stationary. Negotiation meetings with the Ministry of Public Services and Alsumeit University, and discussions with the President of Zanzibar, took steps to improve the social dialogue.

The number of CBA increased from seven in 2016 to twelve in 2019, covering 3,300 and 5,990 workers, respectively. CBAs' scope appears to be relatively low, at around 5.5% among employees (see more in Table 9 and Appendix Table 26).

Table 9: Status of Collective Bargaining Agreements in Zanzibar, 2019

Number of effective CBAs	12
Workers covered by CBAs	5,990
Ratio of CBAs coverage to employees	6.6 %
Ratio of CBAs coverage to employment	0.8 %

Source: ZATUC; own calculations of CBAs' shares based on ILO employment projections.

Tripartite institutions in Zanzibar

Several bi- and tripartite institutions are functioning in Zanzibar, and the participation in these fora has increased in recent years.⁴⁸ The leading institutions' status is summarised below.

Labour Advisory Board

Labour Advisory Board (LAB) consists of nine members: three government members, employers, workers, and all appointed by the labour minister. The board provides advice on labour-related issues, such as proposed legislation, ILO conventions, industrial relations, and working conditions. It is required to meet four times a year.⁴⁹ The board does not function effectively. Bipartite meetings between trade unions and employers' association are informal with general discussions. LAB was involved in implementing a National Plan of Action (NPA) from 2016 that established an integrated platform for improving individual labour dispute resolution system. This institution focuses on strengthening several aspects: i) procedural legal frameworks through law reforms; ii) enhancing the functioning of labour institutions through institutional reforms and capacity building; and iii) promoting bipartite grievances and dispute handling procedures through collective bargaining and workers' councils to encourage voluntary compliance and settlement of disputes.⁵⁰ There were registered regular tripartite meetings in recent years.

Wages Advisory Board

The Wages Advisory Board consists of 13 members representing the government, employers, and workers. It provides recommendation for minimum wages and working conditions. The board is required to meet twice a year and takes consequential decisions annually. One of the significant recent decisions was the new minimum wage in the private sector in 2016. The board has not

succeeded to bring a new minimum wage in recent years (see more in Working Conditions section).

National OSH Committee

This committee negotiates for all matters concerning labour with a legal mandate regarding the Labour Relation Act. Two representatives from each constituent (government, employers, and employees) and the chair are appointed by the minister concerning labour issues. Decisions are mainly made by consensus; thus, the influence of the parties is strong. Tripartite meetings were implemented in this institution in recent years.

Other important bi/tripartite organs

- Conflict Resolution Committee.
- Zanzibar Social Security Board.
- Zanzibar Disabled Board.
- Zanzibar Business Council (bipartite).
- MKUZA on Irrigation/Poverty Board.
- National Committee on HIV/AIDS.
- Committee on Education Policy.
- Aids Business Coalition Zanzibar (ABCZ).
- Education Coordinating Board.
- National Tripartite for Dispute Handling Unit.

Dispute settlement in Zanzibar

The Zanzibar Industrial Court is a division of the High Court of Zanzibar. The institution settles formal labour disputes. Like its Mainland counterpart, the Zanzibar Industrial Court is presided by a judge and two assessors from employers' organisations and trade unions.⁵¹ The court (and its Dispute Handling Unit - DHU) is the only venue where labour disputes can be heard.

During the 2010s, the speeding up of the establishment of the industrial court was in progress. The Ministry for Justice and Legal Affairs initiated hearings with experts to improve the courts' trust and delimit the case delays.⁵² According to a labour administration audit, the industrial court was functioning but slow and irregular due to a lack of resources, especially on the island of Pemba.⁵³ Administrative authorities' power to unilaterally dissolve, suspend or deregister trade union organisations is an issue in Zanzibar. The High Court can interfere in trade union affairs by appointing the Registrar to act as a trade union liquidator.⁵⁴ A recent study revealed that the DHU Unguja alone recorded 689 labour disputes from 2016 to 2019. In 2019, most cases concerned unfair dismissals. The successfully mediation/conciliation settlement rate stood at 36%, while 64% continued to full hearing at arbitration stage. The Industrial Division of

the High Court of Zanzibar, during the same period, recorded 92 disputes.⁵⁵

TRADE UNION RIGHTS VIOLATIONS

Tanzania has experienced some downturns in trade union rights violations during the 2010s. On the Global Rights Index, the country ranked at 3 out of 5+ (5+ is worst) from 2014 to 2016, but it dropped to 4 out of 5+ since 2017. The latter ranking is listed as "systematic violations of rights": the government and/or companies are engaged in serious efforts to crush workers' collective voice, putting fundamental rights under threat.⁵⁶

ITUC's latest registered cases of violations of workers' rights in Tanzania were in 2017 and 2018: i) Tanzania Mines, Energy and Construction Workers Union (TAMICO) member was shot dead; ii) physical threats against TAMICO representative; iii) Kinondoni District Council raised levies to be paid by bus operators without consulting workers; and iv) unions dues withheld by employers.⁵⁷

Generally, there were observations concerning private-sector employers who adopted anti-union policies or tactics. TUCTA claimed that international mining interests bribed government officials to ignore workers' complaints and write false favourable reports on mines' work conditions. They also reported that employers discouraged workers from collective bargaining and retaliated against workers' rights activists via employment termination.

The ILO reported forced labour into domestic service or labour on farms, mines, and business activities in the informal economy. Forced child labour also occurred (see more in Child Labour sub-section).⁵⁸

WORKING CONDITIONS

Tanzania has ratified the ILO Conventions on minimum wage-fixing (C131). Tanzania Mainland's latest minimum wage adjustment was in 2013 for employees in both the public and private sector: The minimum wage standards were divided into twelve sectors. The lowest-paid category was domestic workers residing in the household of the employer, at TZS 40,000 (US\$18) per month; the highest-paid category was for workers in the telecommunications, mining, energy, and financial sectors, at TZS 400,000 (US\$179) per month. In Zanzibar, the latest minimum wage adjustment was approved in 2016 when civil servants' wage increased by 100%, reaching

TZS 300,000 (US\$134) per month (Table 10). Tanzania's gross monthly minimum wage is on the low levels in Africa and in real terms the growth fell by -2.8% in the 2010s.⁵⁹

Tanzania Mainland's latest Formal Sector Employment and Earnings Survey from 2018/2019 registered regular employees earned' wage rate between TZS 300,000 (US\$130) and TZS 399,999 (US\$173) per month. The government and private sector employees also earn wage rates similarly, except parastatals employees earn 600,000 (US\$260) and above per month. Regarding cash earnings, the average monthly salary of regular citizen employees was TZS 530,651 (US\$230) per month with a minimal gender gap at 4.2% favouring men. The average monthly salary of Parastatal employees was TZS 701,524 (US\$304); the private employees' average salary was 565,308 (US\$245), while for Government employees, it was 501,810 (US\$217).⁶⁰

Table 10: Minimum wages in Tanzania Mainland and Zanzibar, per month

	Current Shilling (TZS)	Current US\$
Tanzania Mainland		
Minimum wage (2013-current)	310,777	152
Highest minimum wage (2013-current)	400,000	179
Lowest minimum wage (2013-current)	40,000	18
Zanzibar		
Minimum wage (2013-current)	300,000	134

* Worker is 19 years old with one year of work experience.

Source: WageIndicator.org.

Mainland's labour regulations allow employers to apply to the Ministry of Labour for an exemption from paying the minimum wage. Pay-As-You-Earn (PAYE) for resident employees is deducted at the statutory personal income tax rates, with a top marginal rate of 30%. For non-resident employees, a flat rate of 15% applies. It is worthwhile to mention that workers from the formal sector are receiving at least the minimum wages, but this segment covering just around one out of ten workers; the rest operate in the informal economy, basically not following the labour regulations.

Tanzania Mainland's labour inspection structure is managed by PMO-LYED's Labour Administration and Inspection Section. Of the 88 listed labour inspectors (38% were women) equalled one inspector per 39,000 employees.⁶¹ Inspections were conducted mainly in the

commerce, industry, and trade sectors (32%), followed by the hotel and domestic services (23%). On a broader view of total employment, one labour inspector covered just 280,000 workers. In Zanzibar, general responsibility for labour inspection rests with the Ministry of Labour, Youth, Women and Children Development. They listed five labour inspectors in 2017, approximately one inspector per 14,000 employees (one per 130,000 in total employment). The ILO recommends one inspector per 40,000 workers in less developed countries.⁶²

The ordinary workweek is legally set at 45 hours per week, with a maximum of nine hours per day or six days per week. Before the mentioned reform of the ELRA in 2017, most employers' practices were to turn employee's employment contracts into casualisation of employment contracts. A contract for a specific period shall not be less than twelve months; that is, it compels the employers to grant the employees a more extended employment contract. Labour regulations allow the employee who agrees with the employer to work during annual leave. Employers must ensure that no employees are continuously working in any leave cycle without applying for annual leave.

Additionally, any employee is entitled to sick leave for at least 126 days in a 36-months cycle upon submission of proving from a certified and recognised medical officer. Under most circumstances, it is illegal to schedule pregnant or breastfeeding women for work between 10 p.m. and 6 a.m. Table 11 below provides other standards covered by Tanzania's labour regulations.

Table 11: Status of Working Conditions in Tanzania

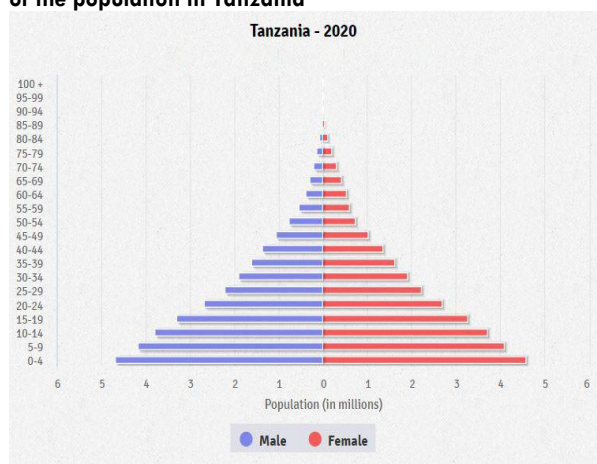
Fixed-term contracts prohibited for permanent tasks	Yes
Maximum length of a single fixed-term contract (months)	No limit
Maximum number of working days per week	6
Premium for night work (% of hourly pay)	5.0 %
Premium for work overtime work (% of hourly pay)	50 %
Paid annual leave (average for working days with 1, 5 and 10 years of tenure, in working days)	20
Minimum length of maternity leave	84
Recieve 100% of wages on maternity leave	Yes
Five fully paid days of sick leave a year	Yes
Unemployment protection after one year of employment	no

Source: World Bank, Doing Business, Labor Market Regulation in Tanzania.

WORKFORCE

Tanzania has the fourth largest population in sub-Saharan Africa with approximated 58 million people in 2020, projected to reach 78 million in 2030. Zanzibar's population was estimated at 1.3 million in 2020. The country's fertility rate (births per women) fell from 6.7 in 1980 to 4.9 in 2018. The life expectancy rate increased significantly from 51 years to 65 during the same period. Thus, the demographic landscape is slowly changing. Currently, two-thirds (63%) of the population is below 25 years old; 54% of the population is in the working age (15-64) (Figure 6).

Figure 6: Population pyramid based on the age-sex structure of the population in Tanzania



Source: CIA, *The World Factbook, Tanzania*.

Workforce represented around 27.2 million in 2019, out of which 22.3 million (88%) were in employment and 3.3 million (12%) were economically inactive. Table 12 projected that Tanzania has a higher employment-to-population ratio at all levels than Eastern African averages. Men have a higher employment-to-population ratio at all levels than women, e.g., a gender gap of eight percentage points among Tanzania's total employment.

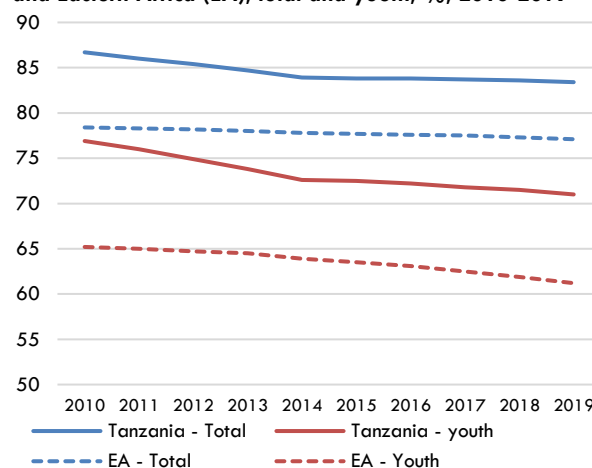
Table 12: Estimations of employment-to-population ratio in Tanzania and Eastern Africa, age and sex distribution, 2019

Sex	Age	Tanzania	Eastern Africa
Total	Total 15+	82 %	75 %
	Youth 15-24	69 %	58 %
Men	Total 15+	86 %	79 %
	Youth 15-24	71 %	60 %
Women	Total 15+	78 %	70 %
	Youth 15-24	66 %	55 %

Source: ILO, *Key Indicators of the Labour Market (KILM)*.

Other estimations showed that Tanzania's labour participation rate experienced a slightly declining trend during the 2010s, which was similar but slower in the region (Figure 7). This drop was driven mainly by youth's declining participation rate, which dropped by six percentage points during the last decade, linked to some upsurges in school enrolment rates along with emigration.

Figure 7: Estimations of labour participation rate in Tanzania and Eastern Africa (EA), total and youth, %, 2010-2019

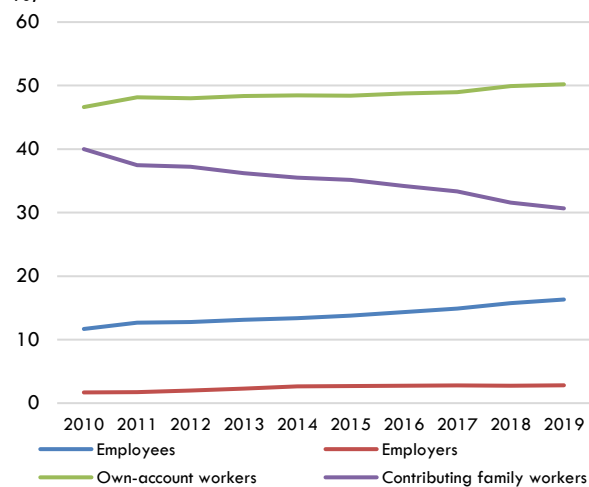


Source: ILO, *Key Indicators of the Labour Market (KILM)*.

Studies registered that around 850,000 young people enter the country's labour market annually, but only 50,000 to 60,000 formal sector jobs are created each year. This situation creates further pressure on the high urban youth unemployment rate and widespread informal economy.⁶³

Figure 8 illustrates that Tanzania was projected to experience some shifts in employment status during the 2010s. It was mainly a significant drop among contributing family workers (self-employment in an establishment operated by a related person) by nine percentage points. Instead, it supported a slight upsurge among employees (workers who get a basic remuneration) and own-account workers (self-employment and not engaged as 'employees' continuously), not to mention a marginal growing share of employers. Since employees are often active in more urban areas, this segment's progress is linked to the rising urbanisation (see more in Migration sub-section). Vulnerable employment (the aggregated contributing family workers and own-account workers) reached 81% of employment in 2019. This group is less likely to have formal work arrangements. Instead, they have weak working conditions and inadequate social security coverage, coupled with a void in applying workers' rights and representation in trade unions.

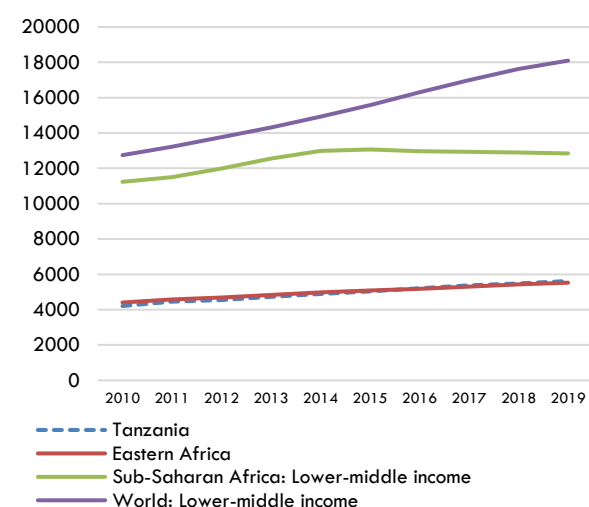
Figure 8: Estimations of status of employment in Tanzania, %, 2010-2019



Sources: ILO, Key Indicators of the Labour Market (KILM).

Employees are often more present in the formal sector with better access to capital, finance, and training. Tanzanian employees' share of 16% is slightly lower than sub-Saharan Africa's of 26% and significantly below the broader world's lower-income countries, at 35%. This situation is mirrored in the labour productivity trends in Figure 9 below that situates Tanzania in line with Eastern Africa average but far below sub-Saharan Africa and the world (lower-medium income). Tanzania's relatively low labour productivity caused the education system's weaknesses to endow workers' skills that are demanded on the labour market to generate more formal jobs, including work-oriented curriculums in all schools to foster self-employment initiatives (see more in Education section).

Figure 9: Estimations of labour productivity trends, 2010-2019



Note: Labour productivity is defined as output per worker (GDP constant 2011 international \$ in Purchasing Power Parity (PPP)).

Source: ILO, Key Indicators of the Labour Market (KILM).

Another glimpse in the employment's landscape is that most Tanzanian private enterprises, around 97%, are household micro-enterprises (1-4 employees), most likely informal; even 66% of these are own account (one person) activities.⁶⁴ These aspects challenge unionism just as weak awareness or incentives to comply with labour and business regulations.

Unemployment

Official data of Tanzania's unemployment rate show it stood at around 10% from 2015 to 2019.⁶⁵ It is a more urban phenomenon than a rural one. For example, Dar es Salaam's unemployment rate was up at around 22%. Youth in Dar es Salaam are six times more likely to be unemployed than rural youth. These official data are based on the international 'relaxed' definition of unemployment (workers available but not looking for work). Other data based on the 'strict' version – all those of working age who were not in employment, carried out activities to seek employment during a specified recent period and were currently available to take up employment given a job opportunity – depicted Tanzania's unemployment rate at 2.2% and up to 5.5% among youth in 2020 (see more in Table 13 Table 13).

Table 13: Estimations of unemployment in Tanzania and Eastern Africa average, 2019

Type	Gender	Tanzania	Eastern Africa
Unemployment	Total	2.2 % *	3.7 %
	Men	1.5 %	2.9 %
	Women	2.5 %	3.6 %
Youth Unemployment	Total	3.5 %	5.6 %
	Men	2.8 %	5.3 %
	Women	4.2 %	6.0 %
Labour underutilisation **	Total	18 %	20 %
	Men	16 %	18 %
	Women	19 %	22 %

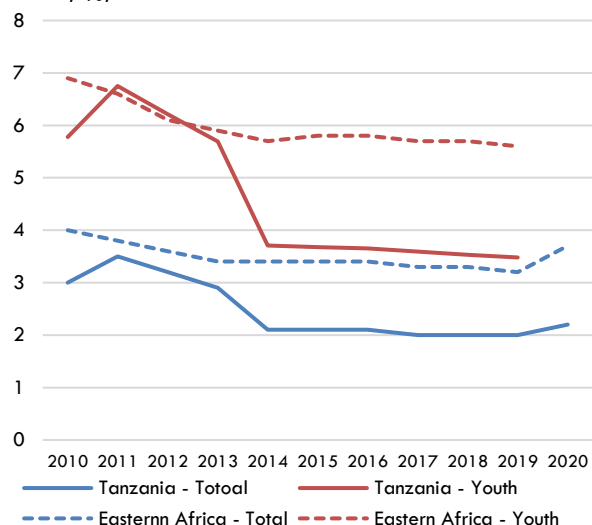
* Projected 2020.

** Workforce that are in unemployment, time-related underemployment, or the potential workforce.

Source: ILO, Key Indicators of the Labour Market (KILM).

The strict unemployment rate declined at the beginning of the 2010s but flattened since 2014, which could be due to awaiting national updated survey data. Nevertheless, the country stayed significantly lower than the Eastern Africa averages. It is worthwhile to mention that the unemployment rate experienced a projected slight upsurge from 2019 to 2020 as an impact of the Covid-19 pandemic due to slowed down private consumption, disrupted trade and personal remittances flow.

Figure 10: Unemployment trend in Tanzania and Eastern Africa, %, 2010-2020



Source: ILO, Key Indicators of the Labour Market (KILM).

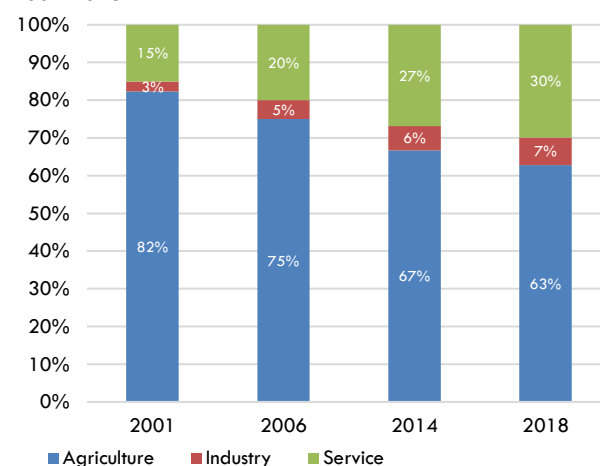
Tanzania’s formal sector does not create sufficient new jobs, reflected in the relatively minor upsurge among employees during the 2010s (revisit Figure 8). Workers are not covered by unemployment protection schemes, and many face poverty. Instead, many workers are forced to participate in some income generation from the informal economy as a survival strategy. It reflects in underutilisation, stuck to vulnerable employment conditions, and measured at 18% in 2019. This measurement reflects a more critical issue than the ‘strict’ low unemployment rate (revisit Table 13). Underutilisation grew slowly during the last two decades, pushed by the fast-growing workforce and the urbanisation on the rise. It furthermore suggests that using the strict unemployment rate to measure the SDG’s target to achieve full and productive employment and decent work is somewhat misleading for Tanzania’s employment reality (see more in SDG Table, Indicator 8.5.2, Page iv).

Zanzibar registered the consistently high unemployment rate that primarily affected the youngest workers: The unemployment rate stood at 14%, while the unemployment rate for the age group 15–24 was estimated at 27%.⁶⁶ Some of the characteristics of unemployment are significantly affected by more women than men and much more significant in urban areas than in rural areas. Furthermore, it primarily affected individuals with lower secondary education, just as the high unemployment rates of urban and educated young people raised the education’s quality. Long-term unemployment appeared more prevalent in Zanzibar than in Mainland, with no major differences across gender and areas.

Sectoral Employment

Tanzania experiences some changes in the aggregate sectors. The proportion of employment in the agricultural sector dropped by 19 percentage points from 2001 to 2018. This shift mainly moved towards the service sector, which increased from 15% to 30% in the same period. Employment in the industry sector remained as a minor group (see more in Figure 11). The sectoral employment’s development was reflected in the rising urbanisation rate.

Figure 11: Employment by aggregate sector in Tanzania, 2001-2018



Source: Tanzania National Bureau of Statistics.

Based on the latest Integrated Labour Force Survey from 2014, the country’s agricultural sector dominated employment. Small-scale agricultural producers were not statistically classified as workers in the informal economy but as self-employed. Informal employment in non-agricultural employment contributed to around 22% of the total employment. Others were present in the private sector (8%), government (3%), household activities, and parastatal covered tiny segments. In Zanzibar, around 13% of workers are in the formal sector while 87% in the informal economy.

The survey listed 20 million employed with basically no aggregate gender gap. Men dominated the industry sub-sectors and service sector’s transport, communication, and public administration. Instead, women are slightly dominating the agricultural sector, driven by many single men with less education moving towards cities to generate income or education. Women are also more present in the trade and restaurant/hotel, business services, and ‘other services.’ The agricultural sector absorbed two out of three in employment, followed by the trade and restaurant/hotel sub-sector, at 17%. The rest sub-sectors were relatively small, including the

manufacturing sector, at 3.1% (see more details in Table 14). Increasing manufacturing employment is part of the global SDGs, and Tanzania is struggling to reach that goal (SDG Table, Indicator 9.2.2, Page iv).

Table 14: Employed persons and GDP share per sector, 2014

Sector	Total sector employment	Sector employment share, %	Ratio of men in sector employment, %
Agriculture	13,409,810	67 %	48 %
Mining & quarrying	218,024	1.1 %	80 %
Manufacturing	615,323	3.1 %	59 %
Electricity, gas & water	32,983	0,2 %	82 %
Construction	422,395	2.1 %	97 %
Trade, restaurants & hotels	3,315,809	17 %	42 %
Transport, storage & communication	552,431	2.8 %	95 %
Finance, real estate & business services	66,623	0.3 %	47 %
Diverse services *	770,518	3.9 %	73 %
Other services **	459,776	2.0 %	33 %
Total	19,863,692	100 %	51 %

* Diverse services - Professional, scientific and technical activities; Administrative and support service activities; Public administration and defence; compulsory social security; Education; and Human health and social work activities.

** Other sources - Arts, entertainment and recreation; Other service activities; Activities of households as employers, undifferentiated goods- and services-producing activities of households for own use; and Activities of extraterritorial organizations and bodies.

Source: Tanzania National Bureau of Statistics, Integrated Labour Force Survey from 2014.

Table 15 below depicts that although the agricultural sector is dominating the total employment, it has a relatively low GDP share at 32%, backed by US\$1,132 per worker per year. In contrast, the industry sub-sectors low employment shares supported significantly higher GDP shares. For example, manufacturing workers delivered US\$4,778 per workers/year. The second-largest employed sector – service and hotel/restaurant – also had a relatively low GDP share per worker, at US\$1,846, backing the relatively low labour productivity (revisit Figure 9). All other sectors' sub-sections had significantly higher GDP shares per workers. Part of this is that these sectors are more formal, capital intensive and concentrated in urban areas. Economic growth is concentrated in the private sector's telecommunications, financial services, retail trade, mining, tourism, construction, and manufacturing.

Table 15: GDP share by sector and per worker in Tanzania, 2014

Sector	GDP share by sector, %	GDP share by sector per worker, US\$
Agriculture	32%	1,132
Mining & quarrying	4.0%	8,843
Manufacturing	6.1%	4,778
Electricity, gas & water	1.3%	18,997
Construction	14%	15,518
Trade, restaurants & hotels	13%	1,846
Transport, storage & communication	7.0%	6,107
Finance, real estate & business services	11%	77,407
Diverse services	7.2%	4,504
Other sources	5.9%	6,185
Total	100%	2,426

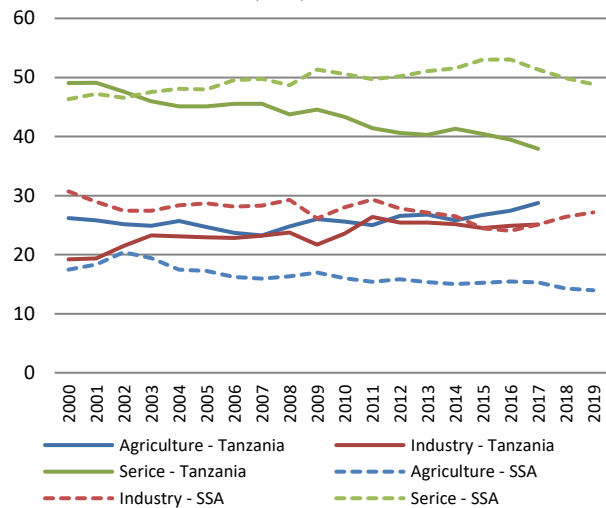
Source: African Economic Outlook, Tanzania 2016; own calculations on GDP share per worker.

It is interesting to observe that the structural changes in employment and aggregate sector employment's status contrasted with the aggregate sectors' GDP share. As previously mentioned, the employment share in the service sector increased significantly. Still, this sector's GDP value-added was considerably declining, and further contrasting, the regional average stood stable. It signals a dysfunctionality between the shifts in the employment structure and the economy in Tanzania.

The observed employment changes did not benefit the employees' segment much. Instead, most workers ended as contributing family workers in informal micro-enterprises with low labour productivity. On the other hand, the agricultural sector's GDP value-added is rising while its employment share drops, suggesting labour productivity grew, driven by a reduction in labour intensity. Part of this resulted from the National Agriculture Policy 2013 that supported medium-scale farms, and small, farm-focused, commercialised farms became a more prominent role. Farmers are more likely to engage in some forms of agricultural intensification and to exhibit a commercial orientation. The real value of agricultural output grew substantially, mostly reflecting a remarkable expansion of cropland rather than increased land productivity. Labour productivity also grew, driven by a reduction in labour intensity.⁶⁷ The industry sector's GDP value-added was stalled during the 2010s, which came in line with the regional average.

More details on the sector GDP value-added trend are available in Figure 12.

Figure 12: Aggregate sector GDP value-added in Tanzania and sub-Saharan Africa (SSA), % of GDP, 2000-2019



Source: World Bank, World Development Indicators.

Migration

Migration is divided into three categories: internal migration (rural-urban, rural-rural, and urban-rural), net-migration (in- and out-migration) and refugeeing.

Tanzania experienced a rural-urban internal migration that boosted the urbanisation process. This situation is similar in other African countries. It did not happen the same way as in Asian countries that created a fast-growing industry sector. In Tanzania, the shift mostly supported the service sector. According to the latest Integrated Labour Force Survey from 2014, migration-measures showed that 27% of persons reported migration to other places from their place of residence. Dar es Salaam had the highest proportion of persons who migrated from other areas, at 56% of the total residents. Other studies revealed that young adults drove the rural-urban migration in Tanzania: higher school completion levels were linked to migrating to town and cities, which benefitted more men than women.⁶⁸ Tanzania's urbanisation rate was 35% in 2019: Compared to the neighbouring countries, it was lower than Zambia (44%) and Mozambique (37%) but significantly higher than Burundi (13%), Kenya (28%), Malawi (17%), Rwanda (18%), and Uganda (24%).

Tanzania has not experienced large-scale flows of internally displaced persons nor Tanzanian refugees. Instead, it tends to have some diaspora living abroad, at around 0.6% of emigrants in total population, and the large majority are in the U.S., at 58% (254,000) among

top countries of destinations, followed by 16% (71,000) in the United Kingdom, Rwanda at 16% (71,000), Kenya at 5.9% (26,000), and Burundi at 3.4% (15,000).⁶⁹ Data show that Tanzania experienced more people left the country than entering during the last two decades, but the negative net migration flow was slowly declining during the 2010s. As part of this, the EU's external migration policies, supporting the implementation of restrictive migration practices and control measures, forced illegally migrated as returnees just as other countries' refugees in Tanzania returned (see more ahead). Besides, personal remittances are not an essential part of the economy (see more in Table 16 and Figure 13).

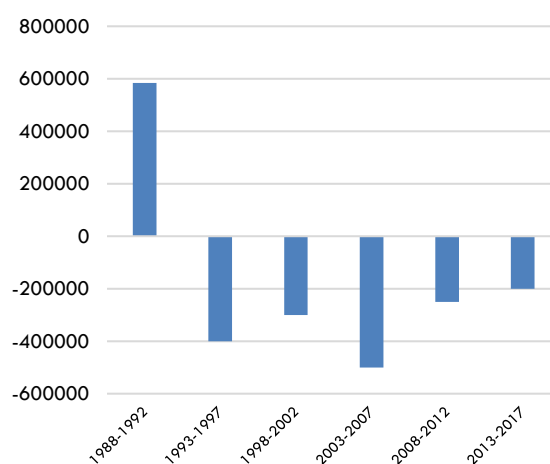
Table 16: Tanzania's migration status

Indicator	Value
Net number of migration (2013-2017)	-200,000 *
Net migration rate *	-0.72 (2020)
	-1.05 (2015)
	-2.42 (2010)
Personal remittance (received), % of GDP, 2015-2019, average	0.8 %
Refugee population, March 2021	264,475

* Net migration is the net total of migrants during a period of five years, i.e. the total number of immigrants less the annual number of emigrants, including both citizens and non-citizens. ** One migrant per thousand of the population.

Source: World Bank, World Development Indicators; KNOEMA

Figure 13: Net migration trend in Tanzania, 1988-2017



Source: World Bank, World Development Indicators.

Tanzania Development Vision 2025 emphasises mainstreaming the diaspora into national development and enhancing the capacity of the Diaspora Department to help strengthen the government's communication,

outreach, and collection of information from its diaspora. In addition, Zanzibar Diaspora Affairs Act defines the Zanzibari diaspora as someone who is affiliated with, and has allegiance to, Zanzibar; it gives the Zanzibari diaspora the right to obtain a Zanzibar identity card and other privileges, including exemption from needing a work permit, multiple-entry long-term visas, and the right to long stays in the country. It also establishes a Diaspora Register, which is to serve as a diaspora expert database.⁷⁰

As a member of the East African Community (EAC), Tanzania is committed to adopting measures to the free movement of persons and labour from the other five member states. Tanzania was reluctant to open its borders and lacked neighbouring countries to implement the provisions in EAC's Common Market Protocol. However, in recent years, the country took steps to improve the protection of migrant workers. It not only sends workers out of the country but also attracts labour migrants: The government opened for granted citizenship. For example, in 2014, almost 170,000 Burundians living in eastern parts of Tanzania were assigned citizenship. Other survey data from 2013 illustrated that only 0.13% of the total workforce was regular non-citizen employees. Foreign migrant workers often faced difficulties seeking legitimate employment in Tanzania, and discrimination against migrant workers often occurred. The Non-Citizens (Employment Regulation) Act 2015 introduced even stricter rules for hiring foreign workers: regulations permit foreign investors to recruit up to five expatriates with the possibility of additional work permits granted under specific conditions. This Act gives the labour commissioner authority to deny work permits if a Tanzanian worker with the same skills is available. It suggests that most immigrants operate in the informal economy.⁷¹ Tanzania's immigration authorities often conduct "special permit inspections" to verify work permits' validity. Besides, the process for obtaining work permits remains immensely bureaucratic, opaque at times, and slow.⁷²

The inflow of refugees started to rise significantly from conflict-riddled neighbouring countries during the 1970s. It especially accelerated the 1990s as an impact of the crisis in Rwanda and Burundi. Tanzania's refugee of asylum rate peaked at 883,000 in 1994. The number of refugees started to decline afterwards, down to the lowest rate at 89,000 in 2014. It was rebounding to 309,000 in 2017, mainly due to Democratic Republic Congo's conflict. These shifts supported the net migration flows in Figure 13 above. The inflow of refugees dropped to 242,000 in 2019 but rebounded at

265,000 in March 2021.⁷³ Estimations suggested that these refugees equalled 0.5% of Tanzania's population on average from 2015 to 2019, lower than Kenya's at 0.9% and Uganda's at 2.6%.⁷⁴

Currently, most refugees located in the country are from Burundi and DR Congo. Refugees are not allowed to leave the camps; most refugees reside in three camps - Nyarugusu, Mtendeli and Nduta - located in the country's north-western areas. In 2018, Tanzania withdrew from the Comprehensive Refugee Response Framework (CRRF). It cost underfunding of aid to refugees and caused shortcomings in water, sanitation, shelter, and overcrowded schoolrooms. Further, Tanzania's government restricted refugees' income-generating activities within the camps.

Informal Economy

The informal economy is a central part of Tanzania's employment structure and interwoven into the economy. A recent analysis from the International Monetary Fund showed that Tanzania's informal economy experienced a declining rate from 60% in 1991 to 39% in 2015.⁷⁵ It has, to some degree, been reflected in the employment shifts and the relatively low informal payment to public officials (see Table 17).

According to the Tanzania National Bureau of Statistics, the concept of informal employment excludes persons engaged in agricultural activities. The informal economy definition includes enterprises owned by individuals or households that are not constituted as separate legal entities independent of their owners; no complete set of accounts, produce some of their goods for sale, and their employment size is below five employees.⁷⁶

Data from the Tanzania Mainland Integrated Labour Force Survey 2014 showed that around 43% of total households (6.3 million persons) were employed in the informal economy. This type of informality was more prevalent in Dar es Salaam (65%) than in other urban zones (57%) and rural areas (32%). The segment increased by three percentage points since 2006. The increase of households in informal businesses was particularly in Dar es Salaam due to the growing internal rural-urban migration and insufficient formal job creation. A broader definition of employment in the informal economy (including workers from subsistence farming) showed that Tanzania Mainland and Zanzibar represented 85% and 88%, respectively (Table 17).

Table 17: Status of informal economy in Tanzania and sub-Saharan Africa (SSA)

Themes	Country/region	Value
Informal economy (% of GDP)	Tanzania (2018)	39 %
	SSA (2014)	37 %
Informal employed in non-agricultural employment	Mainland (2014)	85 %
	Zanzibar (2010)	88 %
	SSA (2014)	66 %
Informal payments to public officials (% of firms) *	Tanzania (2013)	20 %
	SSA (2019)	29 %

* Informal payments to public officials are the percentage of firms expected to make informal payments to public officials to "get things done" regarding customs, taxes, licenses, regulations, services, and the like.

Source: ILO & DFID, Zanzibar Social Protection Expenditure and Performance Review and Social Budget, 2010; Tanzania National Bureau of Statistics, Integrated Labour Force Survey from 2014; and IMF, Shadow Economies Around the World: What Did We Learn Over the Last 20 Years?, IMF Working Paper, January 2018.

Like many other African countries, most new jobs are created in the informal economy, crowding out positions in the formal sector. Tanzania Mainland's National Employment Policy (NEP) assessed that the informal economy could employ 63% of the mounting workforce in urban areas and 8.5% in the formal sector.⁷⁷ The informal economy absorbed many since unemployment is not an option. The adopted employment policy in Zanzibar directed towards increasing job creation by encouraging self-employment and establishing economic-processes zones. It supported investment as well as promoting productivity and competitiveness (revisit Free Trade Zones sub-section).

Generally, business regulations are cumbersome (see Appendix Table 28). Although Tanzania Mainland and Zanzibar lack a Tripartite National Informal Economic Forum, policies address issues that affect workers in the informal economy.⁷⁸ For example, Tanzania Mainland's government had introduced a programme of identifying small scale casual entrepreneurs/workers that could benefit from unique ID cards. It allows them excluded from local authority taxes on the condition that the beneficiary should have a capital of not more than TZS 4 million (US\$1,728) on a return of paying TZS 20,000 (US\$8.6) per year on a renewable basis. Another issue is that trade unions' affiliation of organised workers from the informal economy has been dormant. Nevertheless, some cooperative unions have been established in the fishery industry to secure soft loans from financial institutions, improving their businesses and profits. In Zanzibar, ongoing exercises are to draft a need assessment for a National Informal Economic Policy.

The portability of skills is essential in transitions to formality, intending to enhance workers' employability and facilitate their access to more productive jobs in the formal sector. The skills gained through experience, on-the-job training and apprenticeship in the informal economy are not usually recognised in the formal sector or by training institutions. However, Tanzania offers interesting examples of the recognition of prior learning.⁷⁹

The relatively low poverty reduction in Tanzania persists in the low social protection coverage caught in the widespread informal economy, not to mention during the Covid-19 pandemic in 2020, workers in the informal economy dramatically lost daily incomes and existential problem due to the weak coverage on social safety nets (see more in Social Protection section).

Child Labour

Tanzania ratified the two international conventions on effective abolition of child labour (C138 and C182) (see Appendix Table 27). Regulation of child labour is written in the constitution, Employment and Labour Relations Act, and Law of the Child Employment Act from 2009. It is worthwhile to mention that the legal minimum age for work does not extend to all working children in Tanzania Mainland and Zanzibar, including children engaged in domestic work. The enforcement of regulation related to child labour has low scopes in practice, such as protections for child engagement in illicit activities and domestic work, not to mention the lack of authorisation for the labour inspectorate to assess penalties.

Although Zanzibar has a policy establishing compulsory education through the age of 15, it has not been approved as a law. The Education Act stipulates a mandatory education age of 13, below the minimum age for work. The latest National Action Plan for the Elimination of Child Labour was from 2009. The government drafted a new national child labour strategy in 2018, which has yet to be formally launched.

Assessments suggested that the country made a minimal advancement in eliminating the worst forms of child labour in recent years. Tanzania continued to implement a practice that delayed advancement in eliminating child labour's worst forms. The Mainland government explicitly supports pregnant students' routine expulsion from public schools, making them more vulnerable to the worst forms of child labour (see more in Education section).⁸⁰ ILO's CEACR urged the government to strengthen its efforts to ensure the progressive elimination of child labour and

continue taking measures to ensure that the National Action Plan for Child Labour's Elimination is effectively implemented.⁸¹

Child labour in Tanzania continues to affect an estimated 4.2 million children aged 5–17 years in 2014, around 29% of the total age group. This share dropped by just one percentage point over a decade. It pointed towards that the country was struggling to reach the SDG of eradicating child labour by 2025 (see more in SDG Table, Indicator 8.7.1, Page iv).

Since many families still rely on their children's earnings to supplement the family income supports the continuously relatively high child labour rate. Data of children in employment was declining from 39% in 2000/01 to 29% in 2009 but rebounded to 33% in 2014. And, hazardous work remains likewise rampant, at 22%.⁸² Comparatively, Tanzania's child labour rates hover above Africa averages (see Table 18).

Table 18: Status of child labour in Tanzania and Africa, latest data from the 2010s

Country/ Region	Type	Rate
Mainland	Children in employment	33 %
	Child labour	29 %
	Hazardous work	22 %
Zanzibar	Child labour (2006)	9 %
Africa	Children in employment	27 %
	Child labour	20 %
	Hazardous work	8.6 %

Note: Children in employment: unpaid family workers are people who work without pay in a market-oriented establishment operated by a related person living in the same household. Child labour: work that is mentally, physically, socially, or morally dangerous and harmful to children; and interferes with their schooling. Hazardous work: children in dangerous and unhealthy conditions that can lead to a child being killed, injured, or made ill because of poor safety and health standards or employment conditions.

Sources: Tanzania National Bureau of Statistics, National Child Labour Survey 2014; ILO, Accelerating action against child labour, International Labour Conference, 99th Session 2010; ILO, Global estimates of child labour: Results and trends, 2012-2016.

Most working children are among unpaid family workers (93%), and nine out of ten (92%) are in the agricultural sector. Child labour is often domestic workers, street vendors, shopkeepers, transportation, fishing, clove picking, small businesses, and gravel making. Children also perform dangerous tasks in agriculture, mining, quarrying, and sometimes because of human trafficking.

In Zanzibar, among 5-17-year-olds, only 9% were reported to be engaged in child labour. It is noteworthy

to mention that Zanzibar's child rights law from 2011 was the winner of the 2015 Future Policy Award on securing children's rights, beating 29 other nominated policies to the prize. It earned the award for its balanced coverage of child abuse and violence against children and its promotion of child rights.⁸³

Gender

The government has adopted several laws to enhance women's rights but thwarted by legal systems' plurality: customary law, religious law, and the Koran applicable to Muslims and statutory law: Several discriminatory legislative provisions remain in force (see ahead). Although employers in the formal sector are more attentive to gender provisions against discrimination, these provisions are not effective in the dominant informal economy.⁸⁴ A series of policies and plans were launched, striving to address gender gaps and inequities, and found some positive changes increasing women's part in the ongoing economic transformation, education, social security, health, and financial policies.

The scope of gender disparities is detected in the global Gender Inequality Index (GII), Tanzania ranking 140 out of 162 countries (1 is best) in 2020. This low ranking is especially due to the relatively high maternal mortality and adolescent birth rates, gaps in the population with at least secondary education and the labour force participation rate.⁸⁵ The other Global Gender Gap Index (GGGI) 2020 ranked Tanzania at 68 out of 153 countries (1 is best). The GGGI tracking progress towards closing these gaps over time. The country scores better on health and survival (49), political empowerment (50), and economic participation and opportunity (63). The ranking dropped down in educational attainment (127).⁸⁶

The patriarchal social structure carrying the unequal social power relations between men and women remains rampant. For example, many women are locked out of land ownership. They have limited access to credit and productive farm inputs and lack support from extension services and markets access. Division of responsibilities and decision-making within a family puts women in limited control over household assets and income. Gender discriminations are further illustrated by gender wage differences, promotions and legal protections, and harassment in the workplace. As a reflection, women's gap in mean monthly income was 40% lower than men; even in agriculture, women's mean monthly income was almost half that of men.⁸⁷

Regarding economic participation and income in Tanzania, men are more likely than women as employees and employers. In contrast, women are more present in vulnerable employment (see Table 19). The trend shows that women are slowly becoming more present in the labour market, moving out of non-paying household work. For example, women's share of employees grew by six percentage points from 2010 to 2019, while men at three percentage points, but a gap remains stark. Part of this change relates to the evolving urbanisation.

Table 19: Estimation on workforce key indicators gender gaps in Tanzania, 2019

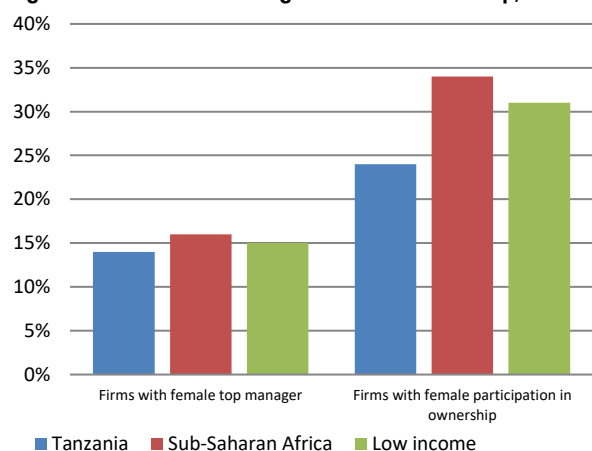
	Men	Women	Men/women ratio gap, percentage point (p.p.)
Employment	86 %	78 %	+8 p.p.
Unemployment	1.5 %	2.5 %	-1 p.p.
Employees	20 %	13 %	+7 p.p.
Employers	3.8 %	1.8 %	+2 p.p.
Vulnerable employment *	77 %	86 %	-9 p.p.

* Aggregated own-account workers and contributing family workers.

Source: ILO, Key Indicators of the Labour Market (KILM).

Women-owned enterprises (WOEs) increased significantly from 35% in the early 1990s to 54% in 2012. Still, almost all were micro-enterprises with fewer than five employees, and nearly three-quarters having only one employee. Most WOE are concentrated in informal, micro, low growth, and low-profit activities. Tanzania's latest Enterprise Survey revealed that 24% of firms had women participation in ownership, which was significantly lower than the sub-Saharan Africa average, at 34%. The country furthermore had a lower score regarding firms with women in top management (Figure 14).

Figure 14: Women in Management and Ownership, 2013



Source: World Bank & IFC, Enterprise Surveys: Tanzania Country Profile 2013.

Youth

Estimations suggested that 30% of Tanzania's workers were between 15 to 24 years old in 2019.⁸⁸ Data from the latest Integrated Labour Force Survey 2014 revealed that just 16% of youth were employees while a majority were unpaid family helpers in agriculture (45%), work on their farm in agriculture (19%), and self-employed in non-agriculture without employees (15%). Young people were rarely found in professional jobs as managers, professionals, or technicians.⁸⁹ Moreover, skills gaps and mismatches are identified by employers as a key constraint: 59% of young workers (aged 15–29) are undereducated, while 9% are overeducated.⁹⁰ The fast-growing youth bulge creates pressure on the education system and job creation; it could turn into a 'demographic bomb' if young people cannot find employment. Since paid employees are limited in rural areas, young people, especially males, push a rural-urban migration flow.

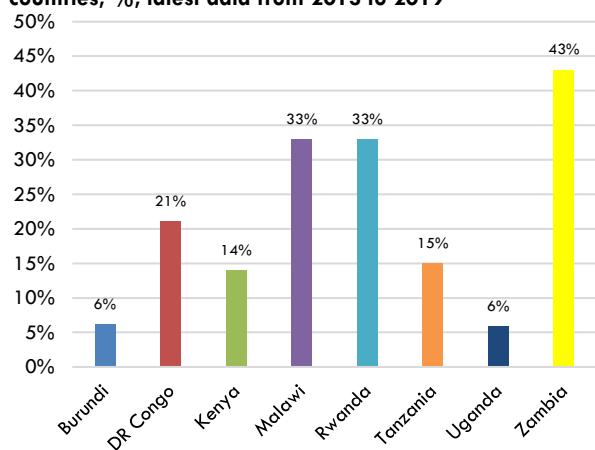
The youth got hit harder by the economic downturn in 2020 as an impact of the Covid-19 pandemic. For example, young people face a more adverse scenario for their opportunities for educational continuity and entry into the labour market. It will affect their social and labour inclusion trajectories, especially among those belonging to the low-income segment.

Tanzanian youth's attitudes towards work and a lack of practical techniques were often cited. It concerned with one-fifth (21%) of youth were unemployed in Tanzania. Rates increase with the level of education because of bottlenecks in the hiring of well-educated but inexperienced youth. Besides, new jobs are mainly in the informal economy. Studies argued that failure to obtain a decent job after completing education could have a severe and lasting impact on a young graduate's professional capacities and skills and their income.⁹¹ Central aspects raised in Tanzania regarding many young women and men, especially in rural areas, were not fully benefiting from the educational system. As a direct result of low-level education, most young workers are undereducated for the jobs they hold, not to mention there are signs of an imminent mismatch between supply and demand in the labour market. Another issue is that employment services are unpopular and ineffective.

The proportion of unemployed, education or training (the NEET rate) is a broad measure of untapped potential of youth who are neither improving their future employability through investment in skills nor gaining experience through employment. Figure 15 shows Tanzania's NEET rate of 15%; it was lower for men than

women's, 11% vs 19%, respectively. The country's NEET rate stayed in line to Kenya (14%), lower than DR Congo (21%), Malawi (33%), Rwanda (33%), and Zambia (43%); but higher than Burundi (6%) and Uganda (6%). Tanzania's relatively low NEET rate compared to some neighbouring countries related to a tradition of combining school with work or looking for a job (as secondary activities).⁹² It furthermore suggested that the government appears to take some right direction to reach the SDG goal by reducing the NEET proportion (see more in SDG Table, Indicator 8.6.1, Page iv).

Figure 15: The NEET rate in Tanzania and neighbouring countries, %, latest data from 2013 to 2019



Note: NEET rate is the proportion of youth not in employment, education, or training.

Source: ILO, Key Indicators of the Labour Market (KILM).

The National Adolescent Health and Development (ADHD) Strategy 2018-2022 focuses on issues affecting adolescents in the country. This strategy detected that risk factors for adolescent health are poor sexual and reproductive health, including sexually transmitted infections, malnutrition and anaemia, substance abuse, mental health concerns, and violence, including gender-based violence. The combination of socio-cultural and economic factors such as relatively low education levels, high poverty rates, discriminatory social norms and extreme religious practices can adversely affect adolescent health outcomes. Also, policies have not fully recognised adolescents as a central demographic segment, while some legislations are unfriendly to ADHD.⁹³

EDUCATION

Tanzania Mainland's current Education Sector Development Plan 2016/17 –2020/21 (ESDP) is linked to the Training Policy of 2014 and other broader development plans. The two key policy initiatives that

distinguish this ESDP from previous plans are providing twelve years of free and compulsory Basic Education to the entire population and the progressive expansion of Technical and Vocational Education and Training (see ahead).⁹⁴ Zanzibar's education sector is guided by the Zanzibar Education Policy (2006–ongoing) and the Zanzibar Education Development Programme II (2017–2022).

Government expenditure on education is relatively high at 20% of government expenditure on average during the 2010s compared to neighbouring countries, e.g., Kenya (19%), Uganda (12%), and Zambia (16%). In Tanzania, half of the expenditures are in primary education, while secondary and tertiary are 18% and 23%.

Tanzania's youth literacy rate stood flat at 86% from 2010 to 2015, suggesting that the education system's development was stalled. Table 20 illustrates that four out of five (81%) of employment had less than basic education and just 14% with basic education. Both intermediate (3.9%) and advanced education (1.1%) were small segments, all with significant gender gaps.

Table 20: Employment by education in Tanzania, % of employment distribution, 2014

	Less than basic	Basic	Intermediate	Advanced
Total	81%	14%	3.9%	1.1%
Men	78%	16%	4.5%	1.5%
Women	84%	12%	3.3%	0.6%

Source: ILO, Key Indicators of the Labour Market (KILM).

The former Basic Education Master Plan from the 2000s aimed at ensuring at least 80% of children complete primary education. Data showed that the attainment rates were on the rise. For example, at least completed primary education increased from 49% in 2002 to 65% in 2012, significantly higher than the neighbouring countries latest rates, e.g., Kenya (51%), Rwanda (36%), and Uganda (33%). However, Tanzania has not yet reached the 80% target. Besides, at least completed lower secondary education rose just from 6% to 11% in the same period. Close nine out of ten children enrol in primary education, and the population has five years' education attainment on average.⁹⁵ It gives other reflections of employability: many children enter early the labour market mirrored in the relatively high child labour rate (revisit Child Labour sub-section). Furthermore, the still relatively low education attainment reduces workers' labour skill capacity that turns into lower labour productivity: The most recent Integrated

Labour Force Survey Analytical Report from 2014 found that only 3.6% of Tanzania’s workforce is highly skilled.

In 2016, a thorough audit of employees found a lack of replacement of public sector retiring teachers, terminated ‘ghost’ teachers, and teachers caught up with fake academic and professional certificates. Low teaching time, weak performance incentives for teachers, delayed or insufficient resource flows to schools and absence of student assessments in early grades were haunting the schools’ quality, e.g., 84% of the almost 2,700 primary schools go without handwashing facilities.⁹⁶ Besides, the fast-growing youth bulge puts further demand for teachers and schools’ facilities.

Tanzania’s government endorsed a controversial school ban under the education regulations since 2017, discriminating against pregnant students, adolescent mothers, and married girls. It pushed many girls to stop going to school.⁹⁷ To illustrate its scope, two out of five girls married before 18 years old. Within the population of married, secondary-school age girls, 97% are not in school due to marriage or pregnancy. Other alternatives routes for this latter segment are either enrol in costly private secondary school or Open Schools and Folk Development Colleges. All these aspects affected a significant upsurge in the education enrolment rates.

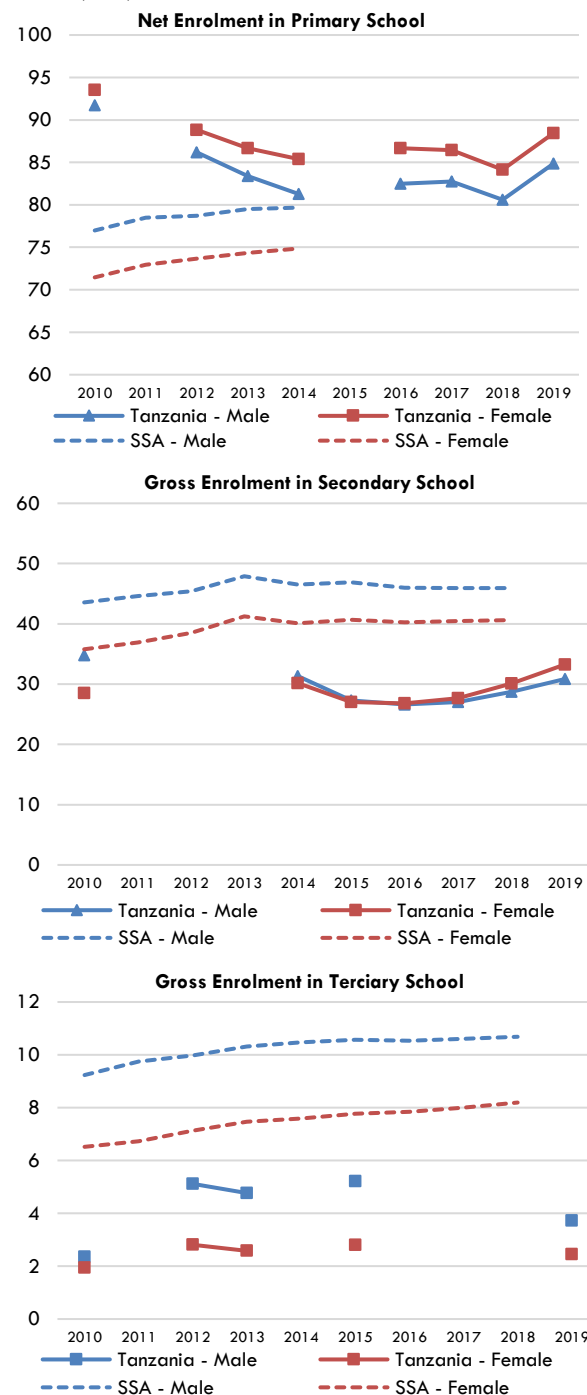
Net enrolment in primary schools increased fast during the 2000s, peaking at 99% in 2008. However, it started to drop during the 2010s. As mentioned, the ESPD (2016/17–2020/21) introduced a fee-free basic education to boost the enrolment rates. Initially, it did not work. The enrolment rate continued to fall, reaching the lowest level at 82% in 2018 but finally rebounded in 2019 (see Figure 16). More girls than boys were in primary school enrolment, and both sexes were hovering above the sub-Saharan Africa averages. In Zanzibar, almost all the eligible population enrolled in primary school, and 85% of children complete their primary education.⁹⁸

Gross enrolment in secondary school, including vocational training, did not evolve during the 2010s, basically stood at a flat growth and remained significantly lower than the regional average. In Zanzibar, the transition from primary to secondary school reached 96% but received a declining enrolment at the advanced secondary level, partly related to the significant overall decline in the pass rates.

Gross enrolment in tertiary education experienced an upsurge at the beginning of the 2010s but faced a

downturn at the end of the decade, not to mention continued considerably lower than the regional average (Figure 16). At this level, school fees, books, and transportation often hindered the enrolment rates.

Figure 16: School Enrolment in Tanzania and sub-Saharan Africa (SSA), male and female, %, 2010-2019



Note: 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 enrolment can therefore be higher than 100 percent, but with tertiary or university education, the age of the pupils is more diverse. Source: World Bank, Education Statistics.

An increasing number of young graduates at different education levels entered the labour market, only to find limited employment opportunities in the formal sector, just as self-employment lack proper entrepreneurship competencies. This situation causes restlessness, frustration and social insecurity among many young graduates and the public in general.

Soon after the first Covid-19 case was reported in Tanzania in March 2020, the government announced a series of closures to schools and some businesses to avert the pandemic spread. However, the government changed its strategy in June 2020, argued the country was free of the epidemic and did not impose any education system lockdowns. In Zanzibar, from the onset of school closures in March 2020, a distance-learning team at Zanzibar's Ministry of Education and Vocational Training's (MoEVT) promoted broadcasting radio programmes that cover literacy, numeracy, and life skills from preschool through the end of primary. This system benefited a long tradition of distance learning in the region. Educational radio broadcasting has been used across Tanzania since the era of independence in the 1960s.

Vocational training

Technical and Vocational Education and Training (TVET) is an integral part of Tanzania's education system. It aims to enable and expand the acquisition of life skills needed to meet the industry and the economy's changing needs. The ESDP's (2016/17–2020/21) second pillar focuses on a progressive expansion of Technical and Vocational Education and Training to provide the pool of skilled human resources needed to advance to becoming a semi-industrialised middle-income country by 2025.

The Ministry of Education governs TVET, and this system is divided into formal and non-formal courses. First, a formal TVET system is offered through two distinct sub-systems: vocational education and training (VET) and technical education and training (TET). TVET programmes are provided at the secondary education level. The VET Fund mainly finances VET, while TET is financed through cost-sharing between providers and clients (students, parents, communities, and private institutions). Various actors are involved in VET. Also, private training providers, companies, NGOs and churches, governmental institutions contribute to the TVET sector.

Second, non-formal TVET programmes are offered through different means, such as lifelong learning education programmes and adult education

programmes, such as vocational training by distance learning, development colleges, university departments, and institutes. There was scarce information available on these informal TVET systems.

Few Tanzanian students received vocational training at around 4% of male and 2% of females in the end of the 2010s.⁹⁹ Some of the central challenges to reach the ESDP's goals concern TVET's coordinating mechanisms as regulatory; quality assurance bodies face difficulties in adjusting training courses to the demands of the labour market and target populations; coordination and harmonise the TVET programmes offered by the various providers and ensure a continuation between the vocational and technical curricula; balance financing between technical non-higher education funding; and define a funding formula to institutionalise the allocation of resources amongst technical institutions to limit the variations in the costs of courses offered by institutions.¹⁰⁰ Besides, TVET is concentrated in urban settings (around 75%), leaving marginal training opportunities in rural areas, where about 65% of the population resides.

The Vocational Education and Training Authority (VETA) is an autonomous government agency responsible for overseeing the VET system. This authority is charged with promoting, coordinating, providing, regulating, and financing VET. VETA provides training through 33 vocational training centres and institutes. It further provides training to vocational teachers through its Vocational Teachers Training College in Morogoro. The institution coordinates more than 700 VET institutions owned by other VET providers in the country, delivering training in the form of long courses, short courses, and tailor-made courses. VETA conducts Labour Market Surveys to determine skills demanded by the labour market.¹⁰¹ Besides, the civil society and faith-based organisations own 345 Vocational Education and Training Centres, and the private sector owns and runs approximately 375 centres. VETA's centres are considered most appropriate to most Tanzanian families due to their affordability emanating from the government's financial subsidies to cover expenses to students from lower-income families.

The Technical and Vocational Education Development Program (2013/14-2017/18) estimated that the highly skilled working population must quadruple while medium-skilled needed to at least double to improve the economic development. It could mean adding about 3 million high-skilled and nearly seven million medium-skilled workers by 2025. As previously mentioned, gross enrolment in secondary school did not evolve during the

2010s. A recent Performance Audit Report on Access to Quality Vocational Education and Training from 2020 found a significant skills gap in lower-level cadres that needs to be filled over the next 13 years to support the country's goal of attaining a medium-income status. The audit suggested that the low-skill occupations must increase by four folds on average for the country to be on par with other medium-income countries.

Only one out of five (20%) VETA applicants were selected for VET courses from 2012 to 2017. Teachers and trainers' deficit rose significantly from 42% in 2013/14 to 69% in 2018/19. It happened in both the private and government-owned VET centres. The relatively low number of students enrolled in the VET centres concerned insufficient access to most applicants who met entry qualifications. The mentioned 2020 audit detected that not all applicants who met entry qualifications were admitted to the VET institutions and centres. For example, students' enrolment was lower than those who wanted and met the criteria to be enrolled: from 2013/14 to 2018/19, only 25,156 candidates were enrolled, close to 105,649 applicants (see Table 21).¹⁰² These candidates are a micro-part of the secondary education general pupils, at 0.3% on average from 2016 to 2018. Especially enrolment from disadvantaged groups, such as females, people with disability, and people from geographically disadvantaged areas, was low. Among others, the enrolment of female students in VET did not reach the target of increasing enrolment by 50% in the year 2017/18; in the financial year 2018/2019, female students enrolment increased by 35%.

Table 21: Number of Applicants and Selected VET Students, 2013-2018

Year	Number applicants	Number selected	Ratio of selected to number applied, %
2013	23,339	4,639	20%
2014	21,512	1,958	9%
2015	16,546	3,584	22%
2016	11,354	4,351	38%
2017	18,254	4,287	23%
2018	14,644	6,337	43%
Total	105,649	25,156	24%

Source: Performance Audit Report on Access to Quality Vocational Education and Training, 2020.

The latest 2020 audit found under-funding for VET activities as the main reasons for the limited selection of students in VETA centres. A significant number of centres do not meet the requisite occupational quality standards, not to mention ineffective compliance monitoring by VETA

Zone offices. In addition, it detected weak infrastructure for teaching and learning, e.g., only 57% of the necessary teaching tools and equipment were available in the visited VETA centres.

Informal training is common. Around 58% of skilled workers arrive from informal apprenticeships, compared to 15% from formal vocational training and 15% in NGO non-formal training. TVET institutions offer regular and tailored short courses for upgrading skills for elementary occupations and the informal economy. Several ministries collaborate to support establishing centres for career counselling and guidance on self-employment opportunities for the informal economy.

Studies show that Tanzania's TVET training facilitates an individual easy transition into employment: technical, on-job training, vocational, and apprenticeship training are central in acquiring formal employment. Although the returns to TVET are positive and statistically significant, TVET graduates receive lower returns than general education graduates.¹⁰³ This situation guided many students away from vocational training, often considering it for failures and underperformers.

The latest business survey from 2013 found that 31% of Tanzanian firms offered formal training. This rate stood below most neighbouring countries' latest rates: Kenya (37%), Malawi (33%), Rwanda (36%), Uganda (35%), and Zambia (37%), but higher than DR Congo (17%) and Mozambique (21%).¹⁰⁴ The survey also found that 40% of Tanzania's formal firms cited an inadequately educated workforce as a constraint, and 63% of failed firms reported that a shortage of workers with the right skills had contributed to their collapse. Besides, a Skills and Development Levy (SDL) is payable by the employer at a rate of 4.5% of employees' cash payments. Still, a reduction down to 4% has been proposed to relieve employers' overheads.¹⁰⁵ Formal firms continue being a minimal group among the widespread informal micro and small enterprises.

Social partners participating in national tripartite technical and vocational education boards and training bodies charged with developing policies and programmes. The trade union movement and employers' organisations recently accelerated their initiatives to support the vocational education and training system. They raised their participation in the national education council's capacity building on VET and VETA, by the same token the newly established Sector Skills Councils. These latter councils are expected to bridge the gap between the labour market demand and the labour supply

provided by TVET institutions. The trade union movement and employers' organisations have started to collaborate with central authorities to customise and adapt TVET supply regarding the labour market's demands. Some of the priorities are to support TVET courses to make them more professional-oriented, update curricula and standards with more practice-learning, certification, improve technical colleges and training centres (e.g., involve companies in boards), skills upgrade vocational teachers, and make better use of employers' contributions based on Skills Development Levy to TVET education.

Technology has the potential to augment the abilities and productivity of workers at all skills levels. The demand for technology services is increasing worldwide, including in Eastern Africa. Demand for digital services such as mobile cellular, internet, mobile and other digital payments is expanding. Tanzania's education in Information and Communications Technology (ICT) has been haunted by the digital divide in imbalances regarding the access to technology learning among the low-income/rural groups. Nevertheless, Tanzania's individuals using the internet increased from 2.9% of the population in 2010 to 25% in 2019, reaching the highest rate among the neighbouring countries. Mobile cellular subscriptions (per 100 people) also increased significantly from 47 in 2010 to 82 in 2019, again the highest rate among the neighbours, except Zambia.¹⁰⁶ At the education level, 17% of students' enrolment to vocational training were on ICT on average from 2013 to 2018, which was the second-highest share among nine sectors, just superseded by the automotive (20%). Generally, computers' delivery practice to students are challenged by technical issues, e.g., lack of adequate computers, no connection of appropriate electric power, and no internet connection.

The Recognition of Prior Learning (RPL) programme was launched in 2013, aiming at open possibilities for people who did not get a formal education in being recognised and certified in firms and offices with low pay. Around 8,000 people were affiliated in 2017, rose to 22,390 in November 2018, and aiming to reach 450,000 artisans by 2025.

Zanzibar

In Zanzibar, VET is governed by the Vocational Training Act of 2006. Vocational training is conducted outside the regular education system to empower the trainee to secure employment, self-employment, or return to the regular education system. Entry qualifications for the longer VET courses vary from lower-secondary to

advanced-secondary school education. The leading institutions involved in TVET are the Ministry of Education and Vocational Training (MoEVT), the Vocational Training Authority (VTA), the Zanzibar Institute for Tourism Development (ZIToD), and the Karume Institute of Science and Technology (KIST). Other stakeholders include the private and public sectors, Non-Governmental Organisations (NGOs), and local communities that conduct training and benefit from skills development. The TVET system comprises four aspects: technical education, VET programme, VET and skills development programmes, and work-based learning based on enterprise training and informal apprenticeship.

TVET data from Zanzibar are scarce: around 67 public and private institutions provided TVET in 2013, and 324 students enrolled in VET technical secondary schools, about 0.4% of total enrolment in secondary education.¹⁰⁷ Besides, enrolment trend for TVET (public only) was estimated at 0% (average annual growth) from 2009 to 2015.¹⁰⁸ In 2019, Zanzibar launched the first Recognition of Prior Learning (RPL) programme that initially developed pilot competency standards for RPL in three occupations.

SOCIAL PROTECTION

The most recent Social Security Laws and Regulations in the United Republic of Tanzania are the Public Service Social Security Fund Act, the Public Service Social Security Fund (General) Regulations, and Social Security Schemes (Benefits) Regulations, all approved in 2018. It reshuffled the previously social security schemes. The country has not ratified ILO's six up-to-date social security conventions (see Appendix Table 27). ILO registered five out of eight social policy areas in Tanzania covered by at least one programme: maternity (cash), employment injury, disability/invalidity, survivors, old age, missing child and family, sickness (cash), and unemployment.¹⁰⁹

The country's low social protection coverage has been haunted by widespread informal economy, missing relevant policies and guidelines, not to mention the system's coordination difficulties.¹¹⁰ Besides, health clauses from collective bargaining agreements still reach just a small segment of employees (revisit Social Dialogue section). Table 22 shows that around 33% of Tanzania's population had health coverage in 2019. In 2016, just 3.2% of persons above retirement age received a pension, significantly lower than neighbouring countries, e.g., Kenya (25%), Rwanda (6.5%), and

Uganda (7.8%) but higher than Malawi (2.1%). The above indicators' low levels reflect the significant challenges to reach the SDG goal concerning by 2030 achieve substantial coverage of the poor and the vulnerable (see more in SDG table, Indicator 1.3.1, Page iv).

Table 22: Proportion of population covered by social protection systems in Tanzania, %, latest year

Type	Coverage
Health coverage, % of population (2019)	33 %
Persons above retirement age receiving a pension (2016)	3.2 %
Mothers with newborns receiving maternity benefits (2016)	0.3 %
Coverage of social protection and labour programs (% of population) (2014)	13 %

Source: DTDA Data-collection tool; ILO, Key Indicators of the Labour Market (KILM); World Bank, World Development Indicators.

Table 23 below illustrates that Tanzania's health expenditures' share of GDP was lower than the regional average, even much lesser concerning health expenditure per capita. Health expenditure per capita was on the rise at the beginning of the 2010s, peaking at US\$44 in 2013, and achieved a minimal level of US\$44 per capita defined by the High-Level Task Force on Innovative International Financing for Health Systems (HLTF).¹¹¹ However, this rate dropped to US\$37 in 2018.

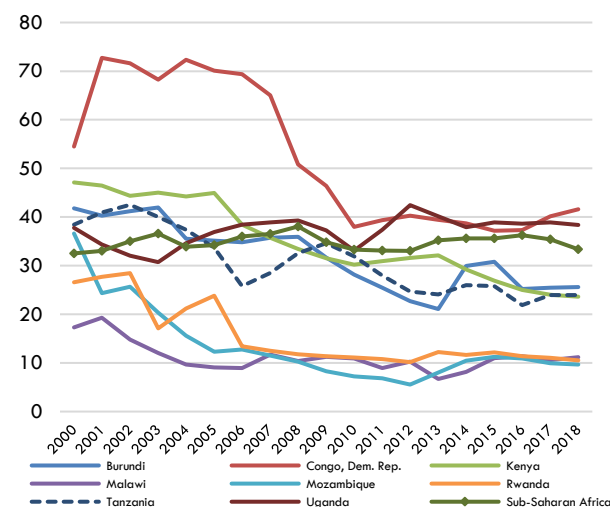
Table 23: Status of expenditure of health and social protection in Tanzania and sub-Saharan Africa (SSA)

Service	Tanzania	SSA
Total health expenditure (% of GDP, 2010-2018 average)	4.3%	5.1%
Current health expenditure per capita (US\$ current, 2010-2018 average)	US\$ 38	US\$ 87
Adequacy of social insurance programs (% of total welfare of beneficiary households)	17%	-

Source: World Bank, World Development Indicators.

Figure 17 below visualises how Tanzania's share of health-care expenditure financed by private households' out-of-pocket payments fell during the last two decades, supported by the rising government health expenditure. These out-of-pocket payments reached 24% in 2018, substantially below the regional average, at 33%. The country stays in line with neighbouring countries like Burundi and Kenya. Using health services is increasing in Tanzania. It reflected decreasing maternal and child mortality rates, but they remained relatively high compared to many other middle-income countries.

Figure 17: Out-of-pocket expenditure as a percentage of total expenditure on health in Tanzania and neighbouring countries, %, 2000-2018



Note: Out of pocket expenditure is any direct outlay by households, including gratuities and in-kind payments, to health practitioners and suppliers of pharmaceuticals, therapeutic appliances, and other goods and services whose primary intent is to contribute to the restoration or enhancement of the health status of individuals or population groups. It is a part of private health expenditure.

Source: World Bank, World Development Indicators.

Tanzania Mainland

Tanzania Mainland attempts to move from social security towards social protection, directed through three phases. First, the Extension and Harmonisation phase was promoted from 2014/15 to 2015/16, aiming to extend coverage towards universal coverage, reform the legal and regulatory framework, and mandatory/basic social protection programs. Second, the current stabilisation phase from 2016/17 to 2020/21 is in progress. It focuses on stabilising a system's functions with new reformed institutions; products supplementary schemes, basic scheme, e.g., universal pension, social health insurance schemes for the informal economy, and life annuity markets services to be provided to the population. Third, the Growth and Prosperity phase from 2021/22 to 2025/26 aims at efficiency, effectiveness, standards, and livelihood.¹¹² According to studies, the process of developing an overarching national social protection framework was stalled, partially because different institutions were anxious to maintain or gain a prominent role in a policy area that has received increasing attention amongst donors.¹¹³

Some of the major social protection reforms in recent years were the enactment of the Public Service Social Security Fund Act from 2018 that merged the several social security funds into two institutions: The National Social Security Fund (NSSF), which now serves for private

employees; and the Public Service Social Security Fund (PSSSF) for public servants. NSSF covers all private-sector employees and self-employed workers (workers from the informal economy), and PSSSF all formal public sector employees on permanent and pensionable terms. Contributions at 20% of wages are imposed under the private sector. The employer has the right to recover up to 10% of the employee's contribution through deduction from wages. In the public sector, the contribution to 20% of wages is also imposed. Still, the employer (the government) has the right to recover from the employee up to 5% via deduction from wages. This spending on the national scheme is high at the national pension system, not just by EAC standards but also by African regional standards.¹¹⁴ Members of the schemes have access to several social security benefits stipulated in the ILO Social Security Convention (C102), such as maternity, unemployment, employment injury, sickness, old age, disability, survivors, and health insurance, not part of income benefits for children and families. For example, the changes in the regulations have introduced a compulsory two hours of breastfeeding for a maximum of six months after childcare leave for mothers.

The trade union movement expressed concern over the proposal of a new computation formula for pensions: 25% would be given as a lump sum, and the rest, 75%, would pay in monthly instalments. TUCTA called for the government to revert to the old formula, under which workers received a 50% lump-sum payment upon retirement. By the end of December 2018, the government announced the new formula would not go into effect until 2023 to provide more time to reach a consensus.

The two most significant social insurance funds offering health and medical coverage are the National Health Insurance Fund (NHIF) that provides immediate access to health services, and the NSSF. NHIF has expanded its active registered members from 164,708 in 2001 to 4,856,062 in 2019, equalled to about 18% of total employment.¹¹⁵ NSSF's affiliated rose from 600,000 members in 2014 to 1,297,299 in 2018, equalled 5% of full employment, and contributors' average pension was 30% of the wage.¹¹⁶

Despite the upsurge of social security/protection coverage, it stays fragmented between the formal sector and the informal economy with unpredictable incomes and unorganised saving mechanisms. The implementation of the security fund reform has been challenged by many workers who often lack awareness or incentives to enrol in the schemes, e.g., workers being disgruntled because

the law abolishes withdrawal benefits.¹¹⁷ Besides, the government has reached huge arrears in payments to the social security funds, which threatens the whole social security system.

The Public Servant Act from 2002 was also amended in 2018 by including a new section, which provided for retirement age. The voluntary retirement age was 55 years, while the compulsory retirement age was 60 years. This reform included professors, associate professors, and medical specialists; their voluntary retirement age is 60 years, while the mandatory age is 65.

There is a weak unemployment benefit scheme and void the CBAs' unemployment fund clause. Recent social security regulations introduced to abolish withdrawal benefits from contributors to social security schemes, which widely drew workers' condemnation. The government assured introducing some unemployment benefit schemes to countercheck the severity of the imposed social security changes. Trade unions were lobbying for a review of the social protection law, arguing that some aspects of the regulations violated the fundamental principles of human labour rights articulated in the United Republic of Tanzania's constitution. The PSSSF Act from 2018 has intended to introduce unemployment benefits to lock in accrued benefits of a member who leaves employment before their retirement date to guarantee a stream of income in old age.

The government is expanding the Tanzania Social Action Fund conditional cash transfer programme, supporting decreasing poverty and child labour. Apart from public major social security schemes, health social security schemes operate in the informal economy, rural and peri-urban areas to provide health services to the disadvantaged groups/households. For example, NSSF's scheme on health insurance for members in the informal economy represented around 75,000 members since its establishment, which constituted about 5.8% of the total membership.¹¹⁸ Furthermore, the Community Health Fund (CHF) is operating in rural areas and Tiba Kwa Kadi fund (TIKA) in the urban areas. These schemes are voluntary, and contribution differs from place to place depending on the agreed lump sum by members in certain areas, mainly districts. The schemes have not fully succeeded to enrol many members due to low health services provided in rural areas.

At the beginning of 2020, to tackle the global Coronavirus (Covid-19) pandemic, the government took

some non-economic measures, such as closing schools, banning public gatherings except religious, suspending international flights. Tanzania's government declared Tanzania free of Covid-19 in July 2020 and stopped publishing data on its number of coronavirus cases. On April 29, 2020, the last day official data were released, there were 509 cases, with 21 deaths in Tanzania. The country's stance in Covid-19 has been questionable by WHO and listed at Level 4 status, meaning transmission of the coronavirus is high or rising rapidly, in February 2021. The country has not imposed any lockdowns or social distancing measures. Public consumption will increase due to higher government expenditures on health and social protection in response to the pandemic.¹¹⁹

Zanzibar

Zanzibar's government promoted a policy of free medical services to all. This policy ensures that poor people are protected from exclusion to access social services, including health. Access to physical health infrastructure covers 136 health facilities at different levels in a radius of 5-7 kilometres available in the islands. Delivering the policy's aims is donor-dependent, at around 50% of health funding.

The Zanzibar Social Security Fund (ZSSF) is the public insurance scheme in Zanzibar, covering only formal-sector workers. Zanzibarian employees could also affiliate to Tanzania Mainland's NHIF. Others are seeking funding for a private health insurance scheme. Zanzibar's government has worked for an extended period to establish a broader social protection fund, but it has been prolonged.

ZSSF's members grew from 54,000 in 2008 to around 80,000 in 2017, equalling 10% of employment. The fund provides old-age pension, life insurance, invalidity, and maternity benefits. The fund delivers a contributory scheme with 10% of the employer's salary and 5% by the employee. The fund's financial sustainability remains uncertain, and ZATUC has been concerned about

compulsory transfers from social security to health schemes. During 2020, ZATUC pushed for improving the ZSSF formula for benefits, not to mention promoting the ZSSF Act's amendment to include unemployment benefit after realising the Covid-19 pandemic's impact on employment.

In 2013, the ZSSF raised the issue of extending social security coverage to workers from the informal economy. Zanzibar's government decided to introduce the Zanzibar Universal Pension Scheme (ZUPS), provided to all older people aged 70 and above. It was launched in April 2016. This new universal pension was the first of its kind in Eastern Africa. The scheme attempts to tackle the weakening of traditional support systems for older people caused by the declining subsistence farming, leaving many older people not receiving adequate support from family members. Most older people do not have any other source of income, such as an earnings-related pension.¹²⁰ According to the new pension scheme, persons over 70 will receive a monthly non-contributory pension of TZS 20,000 (US\$8.7).¹²¹ In 2016, around 21,000 people started benefitting from ZUPS, and in January 2019, 27,758 people (58% were women) received it. A recent study revealed that ZUPS supported a significant positive result of the pension on the overall expenditure of beneficiaries' households and household spending on food and education.¹²²

Workers from the informal economy are voluntary contributors. A self-employed worker or businessperson is required to contribute at least TZS 20,000 (US\$8.9) per month at the minimum period of nothing less than six months. In return, such a worker is entitled to the scheme's full benefits. No exact data on contributors from the informal sector were available.

There are also several non-contributory safety-net programs for vulnerable children, the elderly, and the disabled. Also, Zanzibar has several funds for Zakat, the Islamic founded social welfare, with an amount equivalent to 2.5% of annual personal income.

APPENDIX: ADDITIONAL DATA

Table 24: Registered labour market related national legislations in United Republic in Tanzania, 2014-2020

Type	Law/ decree
2014	
Social security (general standards).	Pension Benefits Harmonization Rule, 2014.
Specific categories of workers.	Zanzibar Nurses and Midwives Council Act, 2014 (Act No. 5 of 2014)
Old-age, invalidity, and survivors' benefit.	Social Security Schemes (Pension Benefits Harmonization) Rules, 2014.
Administration and financing.	Social Security Schemes (Security Electronic Information) Guideline, 2014.
2015	
General provisions.	Employment and Labour Laws (Miscellaneous Amendments) Act, 2015. Zanzibar Public Leaders Code of Ethics Act, 2015 (Act No. 4 of 2015).
Elimination of child labour and protection of children / Employment policy and promotion of employment.	Youth Council of Tanzania Act, 2015.
Migrant workers.	Non-Citizens (Employment Regulations) Act 2015.
Specific categories of workers.	Teacher's Service Commission Act, 2015 (No. 25 of 2015). Public Private Partnership Act, 2015 (Act No.8 of 2015).
Occupational safety and health.	Zanzibar Environmental Management Act, 2015 (Act No.3 of 2015). Zanzibar Disaster Risk Reduction and Management Act, 2015 (Act No.1 of 2015).
Administration and financing	Social Security Schemes (Investment) Guidelines, 2015.
2016	
General provisions.	Miscellaneous Amendment Act of 2016 (Act No. 5 of 2016). Zanzibar Constitution (Eleventh Amendment) Act, 2016 (No. 8 of 2016). Access to Information Act, 2016 (No. 6 of 2016).
Elimination of child labour, protection of children and young persons.	Law of the Child (Juvenile Court Procedure) Rules, 2016 (G.N. No. 182 of 2016).
Equality of opportunity and treatment.	Tanzania Commission for AIDS Regulations, 2016 (G.N. No. 145 of 2016).
Education, vocational guidance, and training.	Zanzibar Institute of Education Act, 2016 (Act No. 4 of 2016).
Occupational safety and health.	Occupational Safety and Health (Notification of Occupational Diseases, Injuries and Dangerous Occurrences) Rules, 2016 (G.N. No. 280/2016). Tanzania Commission for AIDS Regulations, 2016 (G.N. No. 145 of 2016).
Social security (general standards).	Workers, Compensation Regulations, 2016 (G.N. No. 185 of 2016).
Migrant workers.	Non-Citizens (Employment Regulation) Regulations, 2016 (G.N. No. 331 of 2016). Immigration (Amendment) Regulations, 2016 (N.N. No. 246/2016).
Seafarers.	Merchant Shipping (Medical Examinations) Regulations, 2016 (G.N. No. 244 of 2016).
Fishers.	Tanzania Fisheries Research Institute Act, 2016 (No. 11 of 2016).
Specific categories of workers.	Oil and Gas (Upstream) Act of 2016 (Act No.6 of 2016). Tanzania Agricultural Research Institute Act, 2016 (No. 10 of 2016).
2017	
General provisions.	Zanzibar Electoral Commission Office Act of 2017 (Act No. 1 of 2017). Employment and Labour Relations (General Regulations), 2017 (G.N. No. 47 of 2017). Evidence Act, 2016 (Act No.9 of 2016).
Labour administration.	Labour Institutions (General Regulations) 2017 (G.N. No. 45 of 2017).
Social security (general standards).	Public Service Social Security Fund (Act No. 2 of 2018).
2018	
General provisions.	The Environmental Management (Environmental Impact Assessment and Audit) (Amendment) Regulations, 2018 (G.N. No. 474 of 2018).
2019	
-	-
2020	
-	-

Source: ILO, NATLEX, Tanzania.

Table 25: Tanzania Mainland's status of trade unions and number of CBAs, 2019/2020

Trade Unions	Members	Women's share	Trade unions' share	No. of CBAs	Workers covered by CBAs
TUCTA	845,417	62%	100%	444	603,772
CHODAWU - Conservation, Hotel Domestic and Allied Workers Union	63,633	71%	8%	43	6.214
COTWU (T) - Communication Transport Workers Union of Tanzania	11,004	72%	1%	28	3019
TTU - Tanzania Teachers Union (Chama cha Waalimu Tanzania)	419,028	58%	50%	3	413.000
DOWUTA - Dock Workers Union of Tanzania	5,544	7%	1%	5	6.101
RAAWU - Researchers, Academician and Allied Workers Union	10,832	47%	1%	4	2.413
TALGWU - Tanzania Local Government Workers Union	72,288	64%	9%	2	24.364
TAMICO - Tanzania Mines, Energy and Construction Workers Union	20,826 *	82%	2%	18	37.022
TEWUTA - Telecommunication Workers Union of Tanzania	2,360 *	81%	0%	7	23.900
TPAWU - Tanzania Plantation and Agricultural Workers Union	68,133 *	75%	8%	186	44.161
TRAWU - Tanzania Railways Workers Union	7,987	73%	1%	6	4390
TUGHE - Trade Union of Government and Health Workers	61,279	68%	7%	11	9357
TUICO - Tanzania Union of Industrial and Commercial Workers	98,299 *	55%	12%	127	29.315
TASU – Tanzania Seafarer Union	4,204 *	98%	0.5%	4	516
Independent unions *	14,106	-	100%	-	-
TFCAWU - Tanzania Fishing Crew and Allied Workers' Union	2,400	-	17%	-	-
TUJ - Tanzania Union of Journalists	150	-	1%	-	-
TAFIMU	573	-	4%	-	-
IGWUTA	676	-	5%	-	-
TASIWU - Tanzania Social Services Industry Workers Union **	2,851	-	20%	-	-
TUPSE - Tanzania Union of Private Security Employees **	1,102	-	8%	-	-
MPETU	303	-	2%	-	-
FIBUCA	4,508	-	32%	-	-
PRIPPAWUTA	361	-	3%	-	-
NUMET	1,182	-	8%	-	-

* The trade union's share of organised workers from the informal economy: TAMICO of 1.9%, TEWUTA of 9.0%, TPAWU of 0.2%, TUICO of 28%, and TASU of 14%. ** TASIWU and TUPSE are underway to join TUCTA.

Source: TUCTA; DTDA data-collection tool, 2019/2020.

Table 26: Zanzibar's status of trade unions and number of CBAs and their coverage, 2020

Trade unions	Members	Women share	Organisations' share	No. of CBAs *	Workers covered by CBAs *
COTWU-ZNZ - Zanzibar Communication and Transport Workers' Union	2,035	37%	12%	2	400
ZASU - Zanzibar Seafarers Union	1,912	0.4%	11%	-	-
TUICO-Z - Zanzibar Union of Industrial and commercial Workers	1,250	37%	7%	2	90
ZUPHE - Zanzibar Union for Public and Health employees	2,313	48%	13%	-	-
CHODAWU-Z - Zanzibar Conservation, Hotel, Domestic and Allied Workers' Union	923	33%	5%	3	900
ZATU - Zanzibar Teachers' Union	5,934	56%	34%	-	-
ZAFICOWU - Zanzibar Financial and Commercial Workers Union	1,022	41%	6%	2	2,000
TEWUTA-Z - Zanzibar Telecommunication Workers Union	0 **	0%	0%	1	100
ZAPSWU - Zanzibar Public sector Workers Union	2,283	41%	13%	2	2,500
Total	17,672	38%	100%	12	5,990

* Data cover 2019. No revised or new CBAs signed during 2020 due to impact of COVID-19, caused closure of most companies especially under the hospitality and tourist sectors.

** TEWUTA Zanzibar amalgamated with COTWU-ZNZ in May 2020. After amalgamation process completed, TEWUTA Z lost its legality and currently COTWU-ZNZ is in place.

Source: ZATUC and Danish Trade Union Development Agency research.

Table 27: Status of Tanzania's Ratified ILO Conventions, 2016

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	2000
	C098 - Right to Organise and Collective Bargaining Convention, 1949	1962
Elimination of all forms of forced labour	C029 - Forced Labour Convention, 1930	1962
	C105 - Abolition of Forced Labour Convention, 1957	1962
Effective abolition of child labour	C138 - Minimum Age Convention, 1973	1998
	C182 - Worst Forms of Child Labour Convention, 1999	2001
Elimination of discrimination in employment	C100 - Equal Remuneration Convention, 1951	2002
	C111 - Discrimination (Employment and Occupation) Convention, 1958	2002
Governance Conventions		
Labour inspection	C081 - Labour Inspection Convention, 1947	Not ratified
	C129 - Labour Inspection (Agriculture) Convention, 1969	Not ratified
Employment policy	C122 - Employment Policy Convention, 1964	Not ratified
Tripartism	C144 - Tripartite Consultation (International Labour Standards) Convention, 1976	1983
Technical Conventions (Up-to-date)		
Wages	C094 - Labour Clauses (Public Contracts) Convention, 1949	1962
	C095 - Protection of Wages Convention, 1949	1962
	C131 - Minimum Wage Fixing Convention, 1970	1983
Industrial relations	C135 - Workers' Representatives Convention, 1971	1983
	C154 - Collective Bargaining Convention, 1981	1998
Vocational guidance and training	C140 - Paid Educational Leave Convention	1983
	C142 - Human Resources Development Convention	1983
Occupational Safety and Health	C148 - Working Environment (Air Pollution, Noise and Vibration), 1977	1983
	C170 - Chemicals Convention, 1990	1999
Specific categories of workers	C149 - Nursing Personnel Convention, 1977	1983
Dockworkers	C152 - Occupational Safety and Health (Dock Work) Convention, 1979	1983
Seafarers	C185 - Seafarers' Identity Documents Convention, 2003	2017
	MLC, 2006 - Maritime Labour Convention, 2006	2019

Note: Fundamental Conventions are the eight most important ILO conventions that cover four fundamental principles and rights at work. Governance Conventions are four conventions that the ILO has designated as important to building national institutions and capacities that serve to promote employment. There are also 73 Technical Conventions, which ILO considers "up-to-date" and actively promoted.
Source: ILO, NORMLEX, Country Profiles, Tanzania.

Table 28: Ease of Doing Business in Tanzania, 2020

Topics	2020
Overall	141
Starting a Business	162
Dealing with Construction Permits	149
Getting Electricity	85
Registering Property	146
Getting Credit	67
Protecting Minority Investors	105
Paying Taxes	165
Trading Across Borders	182
Enforcing Contracts	71
Resolving Insolvency	116

Note: Doing Business 2020 indicators are ranking from 1 (top) to 190 (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 that affect the competitiveness of the economy. Still, a high ranking does mean that the government has created a regulatory environment conducive to operating a business.

Source: World Bank & IFC, Ease of Doing Business 2018 in Tanzania

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