

Tanzania & Zanzibar - Labour Market Profile 2013

Executive Summary

Main Issues on the Labour Market

- The mainland of Tanzania and the semi-autonomous Zanzibar have separate labour laws, trade unions etc. and are therefore distinguished where possible in this profile.
- Tanzania is a politically stable and peaceful country. However, the country remains poor, with 85% working poor living for less than \$2 a day, a middle class at the size of DR Congo, a high corruption rate, but with a high capital formation relative to the rest of Sub-Saharan Africa.
- The average minimum wage is around \$48 per month and the real minimum wage has been declining for years. A surge in inflation of consumer prices in 2010-2011 has further undermined the living wage. The government has succeeded to improve the economic situation in 2012 and inflation rates have gone down considerably. High cost of living is however still an issue, and – together with the challenge from youth unemployment – need special political attention in coming years in order to avoid social unrest.
- Youth unemployment at 8.8% is double the size of the national unemployment rate. Urban youth and young women are particular vulnerable to unemployment. As with many other countries in Sub-Saharan Africa, this is mainly due to population increases with many young Tanzanians entering the labour force and moving from rural to urban areas, which are not able to generate enough jobs to absorb them. A lot therefore also end up in the informal economy.
- Amendments to the social security law in 2012 caused harsh discussions and strikes as it denied workers to withdraw their contributions before retirement age. The bill was re-tabled in parliament to find solutions concerning short term contract workers. Also the social security scheme NSSF has been opened for contributions from informal sector workers.
- The President and the main opposition party have agreed to form a commission to collect opinions and views on a revision of the constitution. A proposal for a new constitution is supposed to be presented in April 2014 coinciding with the 50 years anniversary of the union between Tanganyika and Zanzibar. Trade unions in mainland Tanzania as well as Zanzibar are represented in the commission and are presenting position papers with workers priorities to be included in the constitution.

Labour Market Developments

Tanzania, mainland

- In 2011 one of the most important labour market institutions LESCO started to have regularly meetings with the trade unions and employers' organizations. LESCO is a tripartite body that gives advises to the Government on different labour, social and economic matters. Two debated issues in 2011 were price increases and temporary employment on contract basis.
- TUCTA has been pushing for a revision of minimum wages for several years. In 2012 the minimum wage for public sector was increased and a survey has been started as basis for a revision of the 2007 minimum wages for private sectors.
- The implementation of free movement of labour within the East African Community was a hot issue in Tanzania in 2011. The Tanzanians worry they will be outperformed by better educated labour migrating mainly from Kenya. In 2012 the fees for work permits were raised by 33%, causing criticism from other EAC states.
- There have been several industrial strikes in Tanzania in recent years. Medical doctors and nurses as well as teachers went on strike in 2012 demanding for improved salaries and work conditions as well as improved quality of services provided. The strikes were called off eventually but the demands are still pending awaiting continued talks and negotiations to be started.

Zanzibar

- A coalition government was formed in Zanzibar after elections in late 2011. The national trade union federation centre, ZATUC, has been increasingly recognised by the government and has regular formal and informal meetings with the President as well as all relevant ministries.
- The Government decided in 2011 to increase the salaries for public workers with 25 % without consulting trade unions. For the last two years ZATUC has been pushing for the Wage Advisory Board to convene and eventually succeeded in May 2012 in having the minimum wage for private sector doubled. After that ZATUC has been pushing for the formation of a National Negotiation Machinery for public sector.
- A merger process has been started among the ZATUC affiliated unions, and in 2012 the Zanzibar Public Service Workers Union was established and registered.

Contents

Trade Unions	4
Trade Unions in Tanzania, mainland	5
Trade Unions in Zanzibar	6
Employers' Organisations	6
Central Tripartite Structures	7
National Labour Legislation	8
ILO Conventions	9
Trade Union Rights Violations	10
Working Conditions.....	10
Workforce	12
Unemployment.....	12
Sectoral employment	13
Migration	14
Informal Economy	14
Child Labour.....	15
Gender	15
Characteristics of the Working Age Population	16
Social Protection	18
General Economic Performance.....	19
Trade.....	20
Trade agreements	20
References.....	21

Trade Unions

Tanzania, mainland

Two different surveys from 2012 from Eurofound¹ and WageIndicator² respectively reported that 16.5% or 40% of workers are covered by a Collective Bargaining Agreement.

TUCTA (The Trade Union Congress of Tanzania)⁷

The sole national trade union federation in Tanzania is The Trade Union Congress of Tanzania (TUCTA), which was established in 2001 under the Trade Unions Act of 1998. TUCTA is governed by a congress, general council, national executive committee and executive board, and led by General Secretary Mr. Nicholas Mgaya.

In 2011, TUCTA had 14 affiliates with around 400,000 members. 1/3 of TUCTA's total membership is organised by the Tanzania Teacher Union (TTU/CWT), which is one of the strongest trade unions in Tanzania. TTU/CWT, together with the trade unions for government workers (TUGHE) and local government workers (TALGWU), represent more than 50% of the total membership.

Trade unions in Tanzania, mainland (2011)	
Number of trade unions	40
Due (median)	N/A
Members of trade unions	465,805
Female members of trade unions	42 %
Trade union member share of labour force	2.1 %
Trade union member share of potential members	58 %
Number of CBAs, (2008)	159
Workers covered by CBAs	N/A
Share of labour force covered by CBAs	N/A
Labour force ³	22 million

Zanzibar

ZATUC (Zanzibar Trade Union Congress)⁷

Labour issues in Zanzibar have historically not been accommodated in union matters. Consequently, the Zanzibar House of Representatives was compelled to enact the Zanzibar Trade Union Act No. 4 of 2001, which allowed registration of trade unions in Zanzibar. Subsequently, the national trade union centre - Zanzibar Trade Union Congress (ZATUC) - was established in 2003.

TUCTA is governed by a congress, general council, executive board, and led by Secretary General Mr. Khamis Mohammed. Nine unions in Zanzibar form ZATUC.⁷

Trade unions in Zanzibar (2008)	
Number of trade unions	9
Due (median)	N/A
Members of trade unions	17,234
Trade union members share of workers	2.1 %
Number of CBAs	N/A
Workers covered by CBAs	N/A
Share of workers covered by CBA	N/A
Labour force (2006 estimate)	870,000

Trade Unions in Tanzania, mainland								
Members, Dues, Collective Bargaining Agreements (CBA) and Occupational Safety and Health committees								
Trade Union / Trade Union Centre	Affiliation To national trade union centre	Total Members (2011)	Female Members (2011)	Estimated potential members (2011)	Dues	Number of CBAs (2008)	Workers covered by CBAs	Number of OSH com- mittees at workplaces
TUCTA the Trade Union Congress of Tanzania		465,805	193,712	342,747		159		
CHODAWU Conservation, Hotel Domestic and Allied Workers Union	TUCTA	32,771	10,522	150,000		30		
COTWU Communication Transport Workers Union of Tanzania	TUCTA	11,565	4,145	5,000		12		
CWT/TTU Tanzania Teachers Union/ Chama cha Waalimu Tanzania	TUCTA	183,781	84,466	-		-		
DOWUTA Dock Workers Union of Tanzania	TUCTA	2,500 (2008)	-	-		2		
RAAWU Researchers, Academician and Allied Workers Union	TUCTA	12,872	4,135	8,000		3		
TALGWU Tanzania Local Government Workers Union	TUCTA	53,703	31,963	-		64		
TAMICO Tanzania Mines, Energy and Construction Workers Union	TUCTA	12,194	1,307	15,938		8		
TASU Tanzania Seafarers Union	TUCTA	55	-	-		3		
TEWUTA Telecommunication Workers Union of Tanzania	TUCTA	2,212	1,031	12,166		1		
TPAWU Tanzania Plantation and Agricultural Workers Union	TUCTA	40,466	12,985	122,277		10		
TRAWU Tanzania Railways Workers Union	TUCTA	9,242 (2008)	-	-		2		
TUGHE Trade Union of Government and Health Workers	TUCTA	48,018	22,844	29,366		3		
TUICO Tanzania Union of Industrial and Commercial Workers	TUCTA	56,426	36,112	20,314		17		
TUJ Tanzania Union of Journalism	TUCTA	502	-	-		-		

Trade Unions in Zanzibar							
Members, Dues, Collective Bargaining Agreements (CBA) and Occupational Safety and Health committees							
Trade Union / Trade Union Centre	Affiliation To national trade union centre	Total Members (2008)	Female Members	Dues	Number of CBAs	Workers covered by CBAs	Number of OSH committees at workplaces
ZATUC The Zanzibar Trade Union Congress		17,234					
COTWU Communication and Transport Workers' Union of Zanzibar	ZATUC	905					
RAAWU Researchers Academicians and Allied Workers' Union of Zanzibar	ZATUC	1026					
TASU Zanzibar Seamen's Union	ZATUC	4275					
TUICO-Z Zanzibar Union of Industrial and commercial Workers	ZATUC	878					
ZALGWU Zanzibar local Government Workers' Union	ZATUC	1275					
ZUPHE Zanzibar Union for Public and Health employees	ZATUC	1990					
ZATHOCODAWU Zanzibar Tourism, Hotel, Conservation, Domestic and Allied Workers' Union	ZATUC	1340					
ZATU Zanzibar Teachers' Union	ZATUC	5327					
ZPAWU Zanzibar Plantation and agriculture Workers' Union	ZATUC	218					

Employers' Organisations

Tanzania, mainland

ATE (Association of Tanzania Employers)

Founded in 1960, ATE is the main employers' organization in Tanzania, and therefore has representatives in most important bi/tripartite organs such as the Labour Advisory Board, the Minimum Wage Advisory Board, The Industrial Court and the boards of the various social security funds. ATE's main objective is to bring about rapid and sustainable socio-economic development in coordination with the government and trade union movement. ATE has around 1000 enterprise members, and provides advisory and representation services to its members with industrial relations, legal, management etc. ATE is governed by an annual general meeting, an executive council and led by executive director Mr. Aggrey Mlimuka.⁴

In 2008, ATE had 826 enterprise members employing 165,089 workers, which is roughly equivalent of 14% of all formal workers.⁵

Zanzibar

ZANEMA (Employers Association of Zanzibar)

ZANEMA is the employers' organization of Zanzibar. It is led by executive director Mr. Salahi S. Salahi.

Membership of ATE5 (2008)		
Divisions	Number of enterprises per division	Number of employees per division
Agriculture	30	25,956
Banking and finance	42	10,298
Commerce	288	25,210
Industry	259	41,263
Mining	20	6238
Oil industry	17	1694
Utilities and services	170	54,430
Total members	826	165,089

Central Tripartite Structures

Tanzania, mainland

Labour, Economic and Social Council (LESCO)

LESCO advises the government through the Ministry of Labour on different matters such as measures to promote economic growth and social equity, and any significant changes to social and economic policy before it is submitted to cabinet. LESCO consists of an independent chairperson and sixteen members all appointed by the Minister of Labour, which represent the interest of the government, employers, workers; and four members appointed because of their expertise. LESCO advises the Minister on e.g. national labour market policy, any proposed labour law before it is submitted to cabinet; as well as collection and compilation of information and statistics relating to the administration of the labour laws. LESCO does not meet regularly, and only a few meetings have taken place since its establishment in 2004.⁶ But in 2011 LESCO started having regular meetings.⁷

Labour Court

The Labour Court is a division of the high court, which settles labour disputes referred to it. The Labour Court is presided by a judge and two assessors from Employers' Organisations and Trade Unions. The labour court is relatively well resourced and is able to process little less than half the cases it receives.⁶

Commission for Mediation and Arbitration (CMA)

Labour disputes are mainly regulated and resolved by mediation through the CMA. It is an independent department of government and has been operating since 2007. The functions of the Commission are to mediate or arbitrate in any dispute referred to the Commission in terms of any labour laws, if the parties to the dispute agree to arbitration or the Labour Court refers a dispute. The CMA is well functioning and therefore an important organ in the Tanzanian labour market. Since its inception in 2007 to 2010, the CMA had received around 19,000 cases and resolved 87% of them.⁶

Sectoral Wage Boards

The members of the Wage Boards are appointed by the Minister in consultation with LESCO. The functions of the Wage Boards are to: (a) conduct an investigation on a minimum remuneration and other conditions of employment; (b) promote collective bargaining between registered trade unions, employers and registered employer's associations, and (c) make recommendations to the Minister on minimum wages and conditions of employment. Wage boards have been established in sectors such as domestic service, private security, agriculture, mining, health etc.⁶

Essential Services Committee

The Essential Services Committee is composed of employers, workers, and government representatives and determines, which services are essential and therefore where workers in these services are not allowed to strike.⁶

Other bi/tripartite organs⁷

- Work permit board
- Vocational training board
- TACAIDS
- 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), technical team member of the adult literacy programme

Zanzibar

Zanzibar Industrial Court

The Zanzibar Industrial Court is a division of the High Court of Zanzibar, which settles formal labour disputes conferred to it and like its mainland counterpart the Zanzibar Industrial Court is presided by a judge and two assessors from Employers' Organisations and Trade Unions.⁸ According to an ILO labour administration audit,⁶ the industrial court is functioning, but is slow and irregular due to lack of resources.

Labour Advisory Board

The Labour Advisory Board consists of nine member, with three members each from government, employers and workers, all appointed by the Labour Minister. The board provides advice on labour related issues, such as proposed legislation, ILO conventions, industrial relations, working conditions etc. It is required to meet four times a year.⁹ However, the board is reported not to function effectively and between 2005-10 the board had only met twice.⁶

Wages Advisory Board

The Wages Advisory Board consists of 13 members, representing government, employers, workers, informal sector, commerce and independent experts. It provides recommendation for minimum wages and working conditions. The board is required to meet twice a year. According to an ILO labour administration audit however,⁶ the board is reported not to function effectively and between 2005-10 the board had only met twice.⁶

Other important bi/tripartite organs⁷

- Conflict Resolution Committee
- Zanzibar Social Security Board
- Zanzibar Disabled Board
- Zanzibar Business Council (bipartite)
- MKUZA on Irrigation/Poverty Board
- National Committee
- Committee on Education Policy
- Technical Aids Committee, Zanzibar Aids Commission
- Education Coordinating Board

In general, social dialogue does not happen on a regular basis in Zanzibar, as many of the bi/tripartite institutions rarely convenes.⁷

National Labour Legislation

The main laws regulating the labour market are:

Constitution¹⁰

The Constitution applies to the United Republic of Tanzania. The state is obliged to realize the right to work and social welfare. The freedom of association is guaranteed, though with several restrictions. Equal opportunity and just remuneration is enshrined in the constitution.

Tanzania, mainland

Employment and Labour Relations Act¹¹

The Employment and Labour Relations Act of 2004 sets fundamental rights at work and regulates hours of work, remuneration, leave, termination of employment, trade unions and employers' organizations, organizational rights, collective bargaining, strikes and lockouts and sets dispute resolution under the Commission for Mediation and Arbitration.

The Labour Relations Act is contradicted by the Public Service (Negotiation Machinery) of 2003¹² for civil servants by having conflicting regulations concerning strikes. TUCTA has been asked by the president for suggestions on amendments.

Labour Institutions Act¹³

The Labour Institutions Act of 2004 applies to the United Republic of Tanzania. It establishes the Labour, Economic and Social Council, the Commission for Commission for Mediation and Arbitration, Essential Services Committee, Sectoral Wage boards, Labour Administration and Inspection and Labour Court

Zanzibar

Labour Act¹⁴

Of the laws specifically to Zanzibar, the Labour Act of 1997 regulates employment, hours at work, wages, leave, vacation, penalties, termination of employment and establishes the labour advisory board and conciliation boards

ILO Conventions

Ratified ILO Conventions ¹⁵		
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
Up-to-date Conventions		
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
Fundamental Conventions are the eight most important ILO conventions that cover four fundamental principles and rights at work. Equivalent to basic human rights at work.		
Governance Conventions are four conventions that the ILO has designated as important to building national institutions and capacities that serve to promote employment. In other words, conventions that promotes a well-regulated and well-functioning labour market.		
In addition, there are 71 conventions, which ILO considers "up-to-date" and actively promotes.		

Trade Union Rights Violations

According to ITUC,¹⁶ neither law nor practice is conducive to the respect of trade union rights, although the global union federations are making some progress with enforcement by means of agreement signed with major multinational employers. The government retains control over many trade union activities, and can suspend a union if it considers that public security or public order are endangered. While the right to collective bargaining is recognised, all collective agreements must be submitted to the Industrial Court for approval and may be refused if they do not conform to the government's economic policy. Furthermore, workers in public services are not allowed to bargain collectively. Strike action is permitted as a measure of last resort, but all strikes are subject to a compulsory 30-day mediation period. The list of services where strikes are prohibited is extensive and covers almost 50% of all services. Strikes in other sectors may be either temporarily or permanently banned after a complicated investigation process. Picketing is not allowed.

In Zanzibar, workers are free to form and join trade unions as well, but a union must have at least 50 members and the Registrar has considerable powers to restrict registration of the union. Furthermore, all strikes are prohibited and workers may not join mainland unions.

According to the U.S. Annual Human Rights Report,¹⁷ workers in mainland Tanzania have the right to freely form and join trade unions, which must have at least 20 members. Trade unions must register at the Ministry of Labour which has considerable leverage, as unions must submit financial records and memberships annually to the Registrar, and it can suspend a union if there is overlap of industries. The right to strike is also protected, except for workers in essential sectors.

Companies often use anti-union strategies in both the mainland and Zanzibar. Anti-union discrimination is especially common in the mining sector, and the Tanzania Mines, Energy, Construction and Allied Workers' Union reported 200 workers fired due to union activities. The use of sub-contracting and day labourers is also a common way for employers to avoid unions. The mining sector is an especially hazardous industry to work in. TAMICO reported that protective gear is often missing in the mines, that working days are long and that labour inspection were barred from the mines.¹⁷

Working Conditions

Tanzania has an elaborate minimum wage setting mechanism with different minimum wages for industries and between the mainland and Zanzibar. In 2010, the minimum wage on the mainland was raised, with the lowest being 70,000 Tanzanian Shilling per month for agricultural workers and the highest 350,000 for workers in the mineral and aviation sector. On Zanzibar the minimum wage was increased to 100,000 shillings in 2011. In 2010, before the minimum wage increase, the median wage was around 170,000, notably higher than on the mainland.

A survey conducted in January 2012 by WageIndicator.org² covering most of mainland Tanzania, showed a medium wage of 114,400 shillings.

The average wage from ILO's database is from 2006, making comparison somewhat difficult, but at \$88 it is almost the same as the median wage in 2012. It does indicate a relatively equal distribution of wages. Nevertheless, it seems that approximately \$70-100 per month is the common wage in Tanzania.

There is no standard legal workweek for the private and informal sector. The public sector has a 40 hour workweek. The average working week is reported to be 60 hours, with longer working weeks among the more informal workers.

Though many labour laws are not effectively enforced in Tanzania, compared to similar countries Tanzania

has several work places Occupational Safety and Health Committees, and several workplaces have acceptable working conditions.⁷

In mainland Tanzania, labour inspection is carried out between the Labour Inspection Department and the Occupational Safety and Health Agency (OSHA). According to ILO,⁶ labour inspection does happens, though the function is limited by insufficient resources and training. The OSHA carried out 3,500 inspections in 2008, but work accidents hazardous conditions are in general not reported to the authorities.

In Zanzibar labour inspection happens on a regular and announced basis with up to eight inspections per month per region, according to ILO.⁶ Like the mainland OSH and labour inspections are separate with some coordination. However, the labour inspection lacks resources and training.

A survey from Eurofound from 2009 reported working conditions for urban workers, with the breakdown below. The survey shows that work is often in unsafe environments, and it takes its toll on the workers health.¹

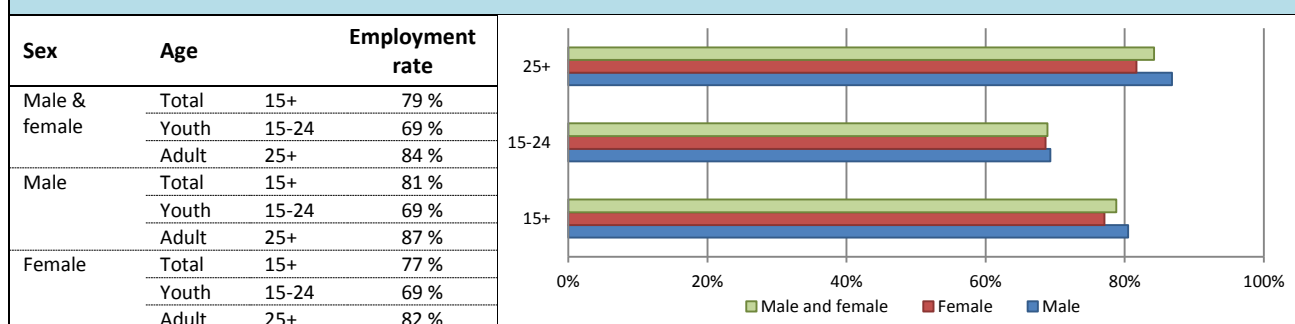
Working conditions¹ (2009)	
Physical work environment and risks	
Physical hazards (% of workers who are exposed to the following hazards around 3/4 of the time or more)	
Noises	37 %
High temperatures	39 %
Smoke, fumes, dust	21 %
Dangerous people (thieves, poachers and so on)	23 %
Being well informed of safety risks	43 %
Violence at work	
Physical violence from people from the workplace	16 %
Physical violence from other people	26 %
Bullying and harassment	15 %
Work and health	
Work affects your health	70 %
Absent due to health problems (% over the past 12 months)	58 %

Wages and earnings			
Monthly average and legal minimum wages			
	Source	Current Shilling	2011 US Dollar
Tanzania, nation wide			
Average wage (2006)	Global Wage Database ¹⁸	98,454	88
Average minimum wage (2009)		80,000	57
Minimum wage for a 19-year old worker or an apprentice (2012)	Doing Business ¹⁹	175,942	111
% minimum wage to value added per worker (2012)	Doing Business ¹⁹	6.1 %	
Wage Share Unadjusted (2007)		12.8 %	
Growth of real minimum wage Average p.a. (2000-2010)	Global Wage Database ¹⁸	42 %	
Growth of real average wage Average p.a. (2000-2006)		50 %	
Tanzania, mainland			
Highest minimum wage (2011)		350,000	221
Lowest (Agricultural) minimum wage (2011)	U.S. Human Rights Report ¹⁷	70,000	44
Median wage (2012)	WageIndicator 2	114,400	72
Zanzibar			
Minimum wage (2011)	U.S. Human Rights Report ¹⁷	100,000	63
Median Wage (2010)	LO/FTF	170,000	122
<i>Median wage is calculated as a 48 hour working week</i>			
<i>% of minimum wage to value added per worker denotes the minimum wage share of labour productivity. Reported as ratio of minimum wage to value added per worker in the Doing Business Report.¹⁹</i>			
<i>The Wage Share is the share of GDP that goes to wages and other forms of labour compensation. It is not adjusted for the self-employed, and can therefore underestimate the amount of GDP that goes to workers, if there are many self-employed in the economy.¹⁸</i>			

Workforce

Employment rates (2011)³

Age and Sex distribution



Most working Tanzanians are poor, with 64% living for under \$1.25 a day and 85% for under \$2.

Tanzania's middleclass is also rather small (about the same level as DR Congo. In 2010, 9% of Tanzanians lived for \$2-4 a day and 3% for \$4-20 a day, compared to Sub-Saharan Africa where 14% lived for \$2-4 a day and 10% for \$4-20 a day.²⁰

Working Poor³

Region	Share of workers in total employment	
	1.25 USD a day	2 USD a day
Tanzania (2010)	64 %	85 %
Sub-Saharan Africa (2005)	49 %	71 %
Sub-Saharan Africa (2011)	44 %	67 %

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

Unemployment in Tanzania³

	Age	Rate
Unemployment Age 15+ (2006)	Total	4.3 %
	Male	2.8 %
	Female	5.8 %
Youth Unemployment Age 15-24 (2006)	Total	8.8 %
	Male	7.4 %
	Female	10.1 %

Unemployment

Unemployment is estimated at 4.3% whereas youth unemployment is double that at 8.8%, with women having notable higher unemployment rates.

According to the 2006 ILO Decent Work Country Programme,²¹ youth unemployment was 20% in Zanzibar. In all of Tanzania unemployed youth were estimated to constitute 28.1 per cent of the urban youth labour force, 31.8 per cent of the rural unemployed population.

Other sources indicate an official unemployment in Zanzibar at 34% in 2012, with a much higher real rate estimating youth unemployment and joblessness as high as 85%.²²

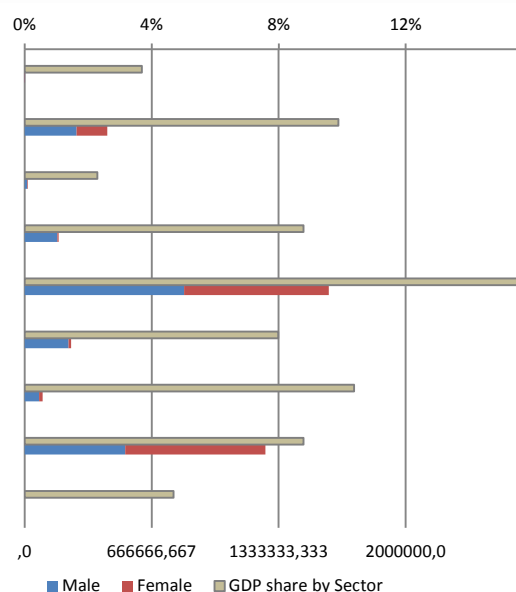
Young women are particularly vulnerable to unemployment due to education and skills, cultural attitudes and practices, discrimination, and limited opportunities to access productive resources. Education does not necessarily provide a clear path to decent employment, as only 6% of annual graduates from secondary and tertiary schools in the mainland finds formal waged employment.²¹ As with many other countries in Sub-Saharan Africa, this is mainly due to population increases with many young Tanzanians entering the labour force and moving from rural to urban areas, which are not able to generate enough jobs to absorb them. A lot therefore also end up in the informal economy.

Sectoral employment

Employment (2006)³ & GDP share (2010)²³

Sector & Sex distribution – (Graph without Agriculture)

Sector	Male employment	Female employment	GDP share per sector
Mining and quarrying	901	134	3.7 %
Manufacturing	272,872	161,335	9.9 %
Electricity, gas and water	13,507	3,498	2.3 %
Construction	171,995	6,686	8.8 %
Trade, restaurants and hotels	837,881	758,909	16 %
Transport and communication	231,116	13,111	8 %
Finance, real estate and business services	76,578	18,709	10 %
Public administration and services	528,725	734,651	8.8 %
Other services	N/A	N/A	4.7 %
Agriculture	5,880,789	6,832,446	28 %



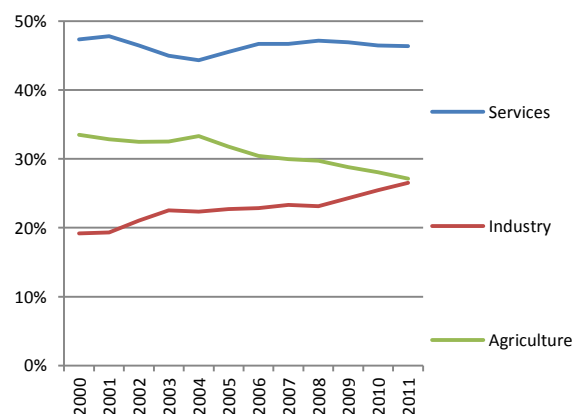
The graph above shows considerable contrasts in the amount of GDP generated in different industries compared to the number of people employed in these industries. The sectors that are male dominated also have higher contribution to GDP, relative to the number of workers in these sectors. Whether these sectors also have the best paid workers, depends on the sectors capital intensity and the distribution of wages.

Women predominantly work in agriculture and much more so than men. Outside agriculture women mainly find work in trade and public administration, and manufacturing is also an important employer of women.

The agricultural sector is by far the largest employer, employing 76% of the workforce though only contributing with 28% of to the GDP.

In the last decade, Tanzania has experienced sectoral shifts, with a diminishing share from agriculture and a growing industry.

Sector Share of GDP²⁴



Migration

Many Tanzanians migrate, almost three times as many as in Sub-Saharan Africa. This is not only due to native Tanzanians migrating for labour opportunities, but also due to refugees returning home. Due to Tanzania's stability it has hosted many refugees from conflict riddled neighbouring countries (mainly Rwanda and Burundi). Many of these have returned home, which is reflected in the 300,000 migrants who left Tanzania in 2006-10.

Tanzania is otherwise reported to be a country which attracts many labour migrants and sends few.²⁵ This may be reflected in the very low share of remittances sent to Tanzania which indicates few Tanzanians abroad sending money home to their families.

The East African Community commits Tanzania to adopt measures to the free movement of persons and labour from the other five member states.

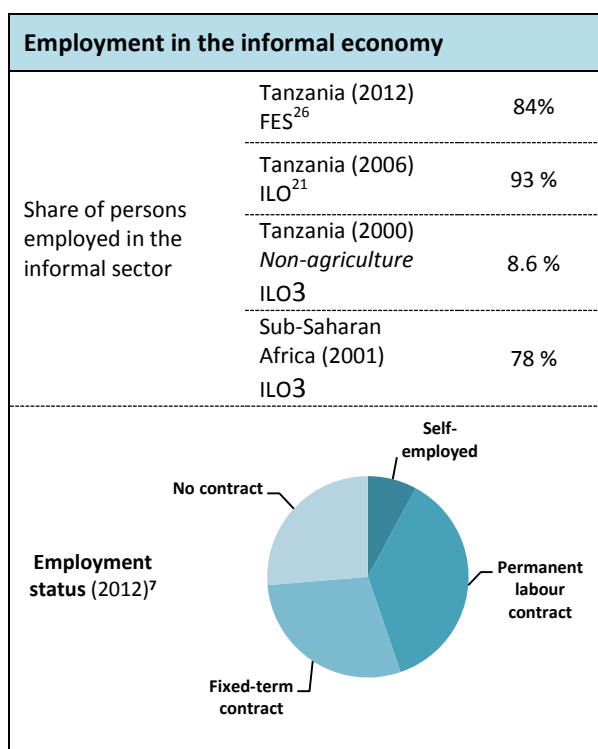
Migration ²⁴		
Net migration (2006-2010)	Tanzania	- 300,000
Net migration to average population per year (2006-2010)	Tanzania	- 1 : 705 inhabitants
	Sub-Saharan Africa	- 1 : 2,048 inhabitants
Personal transfers i.e. remittances received, % of GDP (2011)	Tanzania	0.32 %
	Sub-Saharan Africa	2.61 %

Informal Economy

According to the ILO Decent Work Country Programme²¹ of mainland Tanzania, 93% of Tanzania's workforce is in the informal sector, though these are calculated on proxy data. The ILO database on Key Indicators of the Labour Market³ gives 8.6% of non-agricultural workers to be in the informal sector in 2000. According to research by the Friedrich Ebert Stiftung,²⁶ 84% of the labour force was in the informal economy in 2012. The Tanzanian integrated Labour Force Survey²⁷ indicates that 40% of households have informal activities.

No matter what, it is safe to say that the majority of Tanzanians are employed in the informal sector and this tends to be in subsistence farming. As with many other African countries, most new jobs are created in the informal sector, crowding out jobs in the formal sector. The informal sector also absorbs many of the young, where unemployment is not an option.

A survey conducted in January 2012 by WageIndicator.org² covering most of mainland Tanzania, showed 38% without a contract and therefore without access to social security. The survey preselected workers who have better conditions as it sampled registered self-employed and employees, and not unregistered self-employed in the agricultural sector. The survey also showed that the more young people tend to have no contract, and that the median wage for workers with a permanent contract is more than double that for workers with no contract.



Child Labour

Child labour is as high as 21% in Tanzania, somewhat lower than the Sub-Saharan average. Most children on the mainland work in agriculture, with 32% of rural children being child labourers compared to 11% of urban children. In Zanzibar only 9% of 5-17 year olds are reported to be engaged in child labour.

On the mainland children tend to work as domestic help, street vendors, shopkeepers, small-scale agriculture, family-based businesses, fishing and mining. In Zanzibar children work in transportation, fishing, clove picking, domestic labour, small businesses and gravel making.¹⁷

Working children			
Proportion of all children			
Region	Year	Type	Proportion
Tanzania, mainland ²⁷ (age 5-17)	2006	Child labourers	21 %
		Hazardous work	5 %
Zanzibar ²⁸ (age 5-17)	2006	Child labourers	9 %
Sub-Saharan Africa ²⁹ (age 5-17)	2004	Children in employment	26 %
		Children in employment	28 %
	2008	Child labourers	25 %
		Hazardous work	13 %
Children in employment includes all children who conduct some kind of work, whereas child labourers is a narrower term without mild forms of work. Hazardous work is the worst from of child labour as defined in ILO C182.			

Gender

As noted elsewhere in this report: Trade Unions have 43% female members, with the highest share in TALGWU, the local government union with 60% women and the lowest in TAMICO, the miners, energy and construction union with 11% women. Women have an 11% point lower total employment rate, and a 7% point lower youth employment rate, a notable larger gender gap than the other four neighbouring countries in the East African Community. Women also have higher unemployment rates than men. 55% of agricultural workers are women. Sectors which are male dominated have higher contributions to GDP, such as Construction, Transport & Communication, and Finance, Real Estate & Business Services. There is very little gender difference in school enrolments. Women in general have less education than men with

an average of about 8 months less education, especially with more women having no schooling.

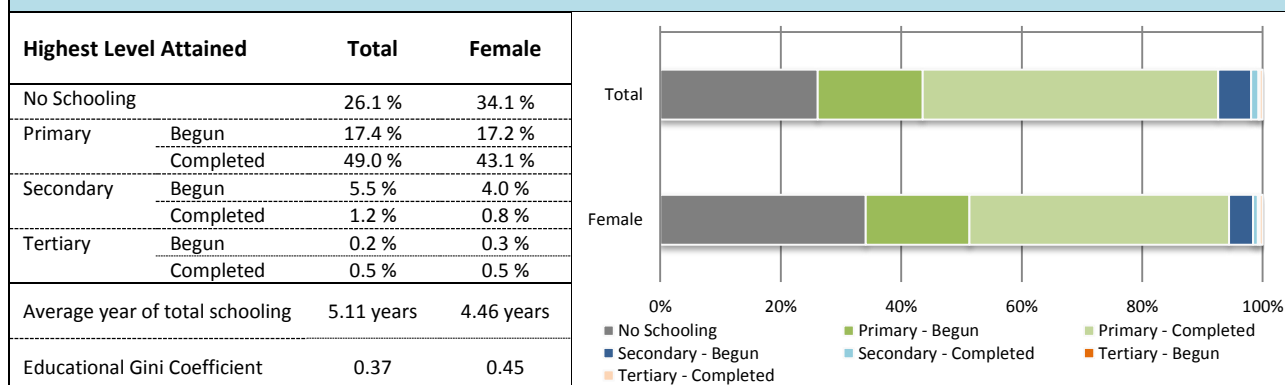
According to the ILO,³⁰ women's lower levels of education are a barrier to running their own farms. Lower levels of education are also a barrier to women obtaining better-paid jobs on commercial farms and women working on agricultural estates are almost always the pickers and packers and very rarely attain management positions.

ILO's Decent Work Country Programme for Tanzania,²¹ mentions a need for increased gender equity in trade union membership and leadership levels. TUCTA and ZATUC are collaborating with the trade union confederation for the East African Community EATUC, to promote gender equality, both within the labour movement and in Tanzania.³¹

Characteristics of the Working Age Population

Highest level attained and years of schooling in the population (2010)³²

Population 25+, Total and Female



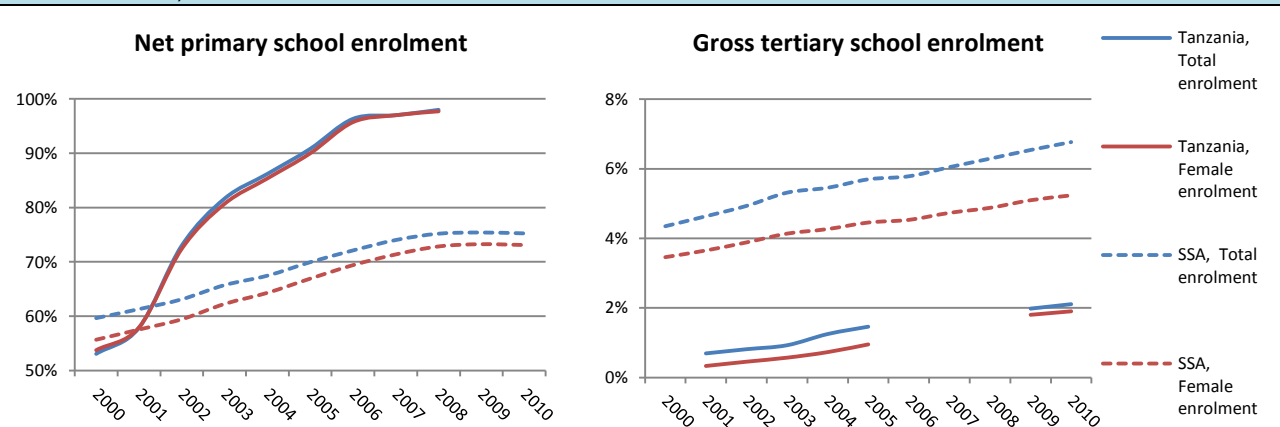
Primary, secondary and tertiary is the internationally defined distinction of education. In Denmark these corresponds to grundskole, gymnasium & university.

The educational Gini Coefficient is similar to the Gini Coefficient, but instead of measuring the distribution of income in a population, it measures the distribution of education measured as years of schooling among the population.³³

The population in Tanzania has an average of around 5 years of schooling. Most of the population has managed to complete primary school. Very few Tanzanians have completed secondary school, and extremely few have completed university. The graph above shows the educational attainment of all Tanzanians above 25 years, and therefore gives a glance of the human capital of the labour force.

Women in general have less education than men, but slightly more have completed university.

Enrolment in Primary and Tertiary schools (2000-2010)²⁴ Total and Female, Tanzania and Sub-Saharan Africa



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 %, but with tertiary or university education, the age of the pupils is more diverse.

Data for enrolment in secondary school is not available for Tanzania, but other data gives participation in secondary education from 2005-10 at 26% for boys and 24% for girls. Compare that to 31% for boys and 28% for girls for Sub-Saharan Africa.

The government has successfully implementing free and compulsory primary education in 2001, considering the high enrolment rates in Tanzania. The primary enrolment rates are extremely high, with the prevalence of child labour in Tanzania in mind. They do only record enrolment, and primary school attendance is around 80%³⁴, which is still very high for Sub-Saharan Africa. The expansion in primary school has not been equalled by expansion of teachers and schools facilities, which constrains the educational system.

Secondary and especially tertiary educations have lower enrolment rates than the rest of Sub-Saharan Africa.

Formal vocational training is administered by the Vocational Education and Training Authority of Tanzania, which runs training centres. Vocational training is also done by, technical colleges, religious training centres, private training centres and through informal apprenticeships. According to an ILO survey from 2008,³⁵ apprenticeships averages of 21 months. The training fee is an average around 4000 Tanzanian Shilling per month, and a skilled worker will earn an average of 81,228 shilling (\$65 - 2011 USD). Informal training is the most common with 58% of skilled workers coming from informal apprenticeships, compared to 15% from formal vocational training and 15% in NGO non-formal training.

Social Protection

Tanzania, mainland³⁶

The National Social Security Fund (NSSF) provides old age pension, life insurance, funeral grants, invalidity, maternity benefits and employment injury. It is available for both private and public formal sector workers, and has been extended to cover informal self-employed workers. It is a contributory scheme with 20% of salary, shared equally between employers and employees. As of 2007 NSSF had 307,539 members, with dependants covering around 4% of the population. Old age pension, invalidity and life insurance are paid on a monthly basis, and other benefits paid as lump sums.

The National Health Insurance Fund (NHIF) provides healthcare, is compulsory for public sector employees and covered around 1 million Tanzanians in 2006. It is a contributory scheme with 6% of salary, shared equally between employers and employees, covering around 2.5% of the population. The Community Health Fund (CHF) is available in half the districts of Tanzania, and a household can join for a one time prepaid amount. 10% of households have joined CHF. There are also micro health insurance and private health insurance, with limited coverage.

In addition, different segments of the workers in (mainly) the public sector could benefit from the contributory Parastatal Pension Fund, Public Service Pension Fund, Local Authorities Pension Fund, Government Employees Provident Fund and Public Service Retirement Benefit Scheme. Community based funeral insurance also exists.

Tanzania also runs several non-contributory safety net programmes for elderly, disabled, vulnerable children and a community-based conditional cash transfer pilot programme.

The ILO convention 183 on maternity leave protection has not been ratified. Following the Employment and Labour Relations Act of 2004, compulsory maternity leave is 6 weeks after the birth and a total of 10 weeks³⁷

Zanzibar³⁸

The Zanzibar Social Security Fund (ZSSF) is the only public insurance scheme in Zanzibar. It provides old age pension, life insurance, invalidity and maternity benefits. In 2005 ZSSF members constituted 8.6% of employed population. It is a contributory scheme with 10% of salary paid by the employer and 5% by the employee. Pension in Zanzibar is generally much lower

than in mainland Tanzania, at an average 3.5 times lower. Old age pension and invalidity are paid as monthly and a lump sum, life insurance as lump sum. Payout to old age pensions have tended to be delayed, often for several years.⁷

For employment injury, employers are required to pay 48 months' salary or 5 million of Tanzanian shilling, whichever is the higher for permanent injury, and for partial injury the compensation is 48 months of salary relative to the gravity of the injury.

Zanzibar has several non-contributory safety net programmes for vulnerable children, elderly and disabled.

Zanzibar also has several funds for Zakat the Islamic founded social welfare, for an amount equivalent to 2.5% of annual personal wealth.

Public spending on social protection schemes (2007)

	2007 Tanzanian Shilling	221 billion
	2011 USD	\$ 192 million
Public social protection expenditure, excl. health	% of GDP ³⁹	1.2 %
	per capita	\$ 4.8
	per worker	\$ 9.7
	of government revenue	N/A
Public health expenditure	% of GDP ³⁹	3.3 %

Coverage of contributory schemes to potential demographic⁴⁰ (2007)

Life insurance		3.3 %
Disability		3.3 %
Employment Injury		2.0 %
Maternity protection		2.0 %
Sickness in employment (2006)		1.5 %
Old age pension		3.7 %
Old age pension recipient ratio 65+		3.2 %
Total coverage of social insurance schemes	Tanzania, mainland	3.4 %
	Zanzibar	6.6 %

General Economic Performance

Key Facts (2011)				
GDP ²⁴	GDP per capita ²⁴ (PPP)	GNI ²⁴	Human Development Index ⁴¹	Gini Coefficient (2007) ²⁴
23.7 billion USD	1,521 USD 178 of 201 countries	23.6 billion USD	0.466 152 of 187 countries	0.38 68 of 156 countries

Doing business ⁴²	Control of corruption ⁴³	Government effectiveness ⁴³	Rule of Law ⁴³
127 of 183 countries	-0.52 136 of 212 countries	-0.54 135 of 212 countries	-0.52 141 of 212 countries

Tanzania has enjoyed decades of political and social stability and also decades of donor support with mixed results.

Recent discoveries of off-shore gas deposits, offer an opportunity for enriching Tanzania. However many other African nations have experienced increased corruption, conflict and little enrichment from extractive industries, and Tanzania has already attracted criticism for not doing enough to avoid the resource curse.⁴⁴ The capital intensive extractive industry will also create few jobs. The Mchuchuma coal mine for example, have created 5,000 direct jobs for an investment of 12% of GDP.⁴⁵

The real growth rate has been resilient during the financial crisis and is expected to rise to 6.8% in 2012 and 7.1% in 2013.⁴⁹ Tanzania's growth is well above the Sub-Saharan Africa average expected to grow at 5.3% in 2012 and 5.6% in 2013, and above the free-trade area of the East African Community, which is one of the best performing regions in the world with 6% growth in 2012.⁴⁶

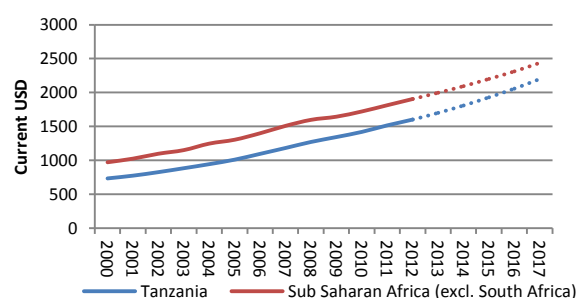
Inflation used to be low, but have risen recently and is expected to reach 17% in 2012.⁴⁷ According to a study by the African Development Bank⁴⁸ the inflation surge is mainly due to rising world oil prices, with oil prices explaining 26% of the short run inflation, monetary expansion 20% and rising food prices 9%.

Tanzania has a somewhat lower GDP per capita measured in Purchasing-Power Parity than the rest of Sub-Saharan Africa, a trend which is expected to continue, as it has been growing at more or less the same rate. Capital formation in Tanzania is quite high though at 29% in 2010, considerably above other Sub-

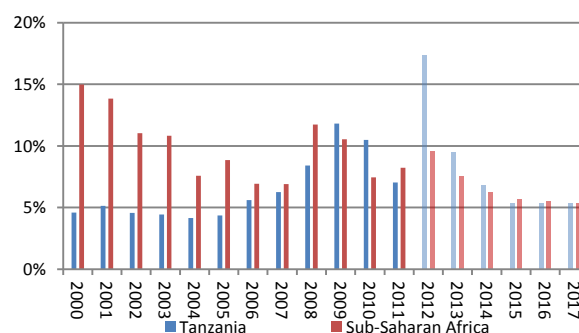
Sahara African average, a sign that Tanzanians are investing in production equipment and likely an outcome of the political and economic stability. Equality is at a medium level in Tanzania, though taking the low GDP per capita in account, it is unlikely to be a sign of good social development.

The doing business indicator ranks Tanzania 127 out of 183 countries. A high ranking means the regulatory environment is more conducive to the start-up and operation of a local firm. Tanzania especially scores low on Dealing with Construction Permits, Registering Property, Paying Taxes, but scores above average on Enforcing Contracts. Tanzania scores medium to low on the three governance indicators Control of Corruption Government Effectiveness and Rule of Law.

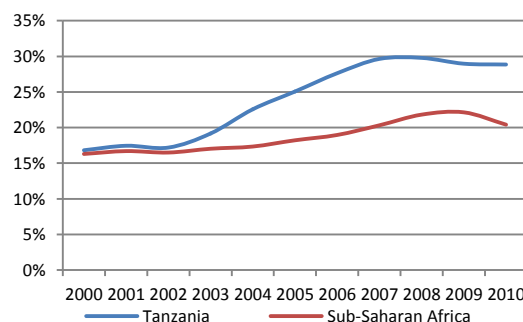
GDP per capita (PPP), trend and forecast⁴⁹



Inflation, trend and forecast, 3-year averages⁴⁹



Gross fixed capital formation (% of GDP)²⁴



Trade

Exports received a boost during the financial crisis, as demand for gold increased.⁵⁰ Raw materials such as minerals and metals in general form the majority of Tanzania's exports, followed by agricultural products. Mining and raw material extraction is a very capital intensive sector, which has a small effect on employment.

The balance of trade is rather good and exports high, likely because of the large share of raw materials in the exports.

In 2013 restrictions will be instituted on the size of land that single investors can acquire. Disputes over land, have become a major issue in Tanzania, often with small scale farmers pitted against powerful investors, who seeks to use the land for production of cash crops exports, such as sugar.⁵¹

Trade agreements

Tanzania is part of the East African Community (EAC), which also includes Burundi, Rwanda, Kenya and Uganda. The EAC free trade agreement from 1999 contains a labour provision with cooperation on employment and working conditions with an emphasis on gender equality and discriminatory law and practices. Likewise, the labour provision of the COMESA agreement extends to cooperation on employment conditions and labour law.⁵² Tanzania is also part of the 2000 Cotonou Agreement between EU and African, Caribbean and Pacific (ACP) countries, which reaffirms commitment to ILO's Fundamental Conventions and includes a labour provision on cooperation on various labour and social issues.

In 2005 the EAC established a customs union and in 2010 the EAC agreed to establish full common market with free movement for workers, goods, services and capital.

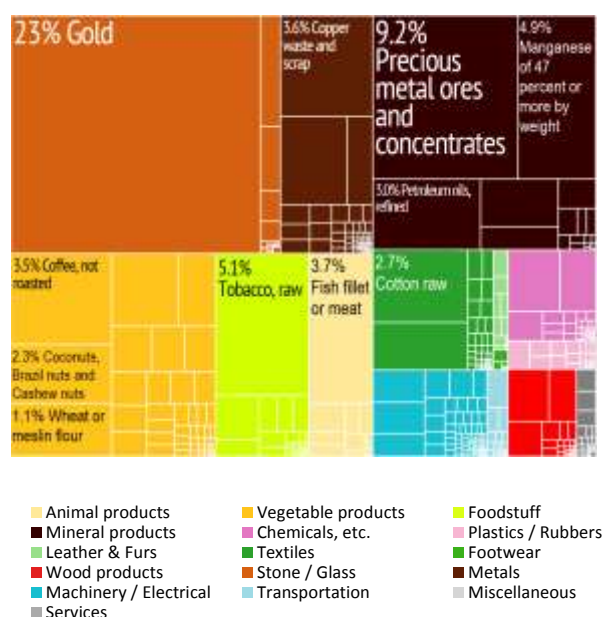
Freedom of association and collective bargaining is enshrined in the EAC common market in the sense that an EAC migrant worker has equal rights as a national.⁵³ The free movement of labour within the EAC opens up questions of how to achieve equal opportunities and equal social and labour rights for migrant workers, for example if workers can bring pensions with them across borders. On the other hand, the free movement of labour is also a source of concern in some of the EAC countries, as the countries workforces have differences in productivity and educational level (with Kenya enjoying a relatively mobile, well-educated workforce and

entrepreneurship). However, the actual implementation of the economic integration have slowed down the last few years especially with regards to lifting barriers to trade and free movement of labour. Although formal tariffs are increasing abolished, trade is still challenged by non-tariff barriers and corruption.

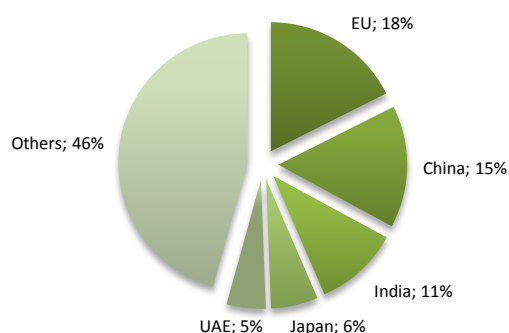
Trade and Foreign Direct Investment

Exports ⁵⁴ (2011)	Imports ⁵⁴ (2011)	FDI flow ⁵⁴ (average 2007-11)	FDI Stock ⁵⁴ (2011)
5.4 billion USD	8.6 billion USD	291 million USD	2.62 billion USD
23 % of GDP	37 % of GDP	1.9 % of GDP	7.5 % of GDP

Products share of exports (2010)⁵⁵



Tanzania's main export markets (2010)⁵⁶



The objective of the East African trade union movement is to safeguard workers' interests in the EAC, ensure that ILO standards are upheld and member states' labour policies are harmonized and the tripartite model is institutionalized, while the free movement of labour is promoted. The trade union movement has reached observer status in the EAC in 2009, and along with employers' organizations they participate in ministerial summits, sectoral summits, and other summits that involve labour market issues.

Through the EAC, Tanzania can export duty and quota free to EU since 2008, and will have to gradually remove duties and quotas on EU exports to Tanzania on most products, except the products deemed to need protection from EU exports. These include agricultural products, wines and spirits, chemicals, plastics, wood based paper, textiles and clothing.

Since 2001, Tanzania has benefitted from the United States' African Growth and Opportunity Act (AGOA), which is a Generalised System of Preferences. It allows duty and quota free access for some products. Tanzania can be removed from AGOA, if the United States deems that Tanzania among other human rights issues, do not seek to uphold the ILO Core Labour Standards and have acceptable minimum wages, hours of work and occupational safety and health.

The Export Processing Zone and Special Economic Zone programmes in Tanzania were established in 2002.⁵⁷ Tanzania has 25 Export Processing Zones, with around 10,000 employees contributing with 5% of national exports, mainly within the sectors of machinery, processing of food and of minerals.

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