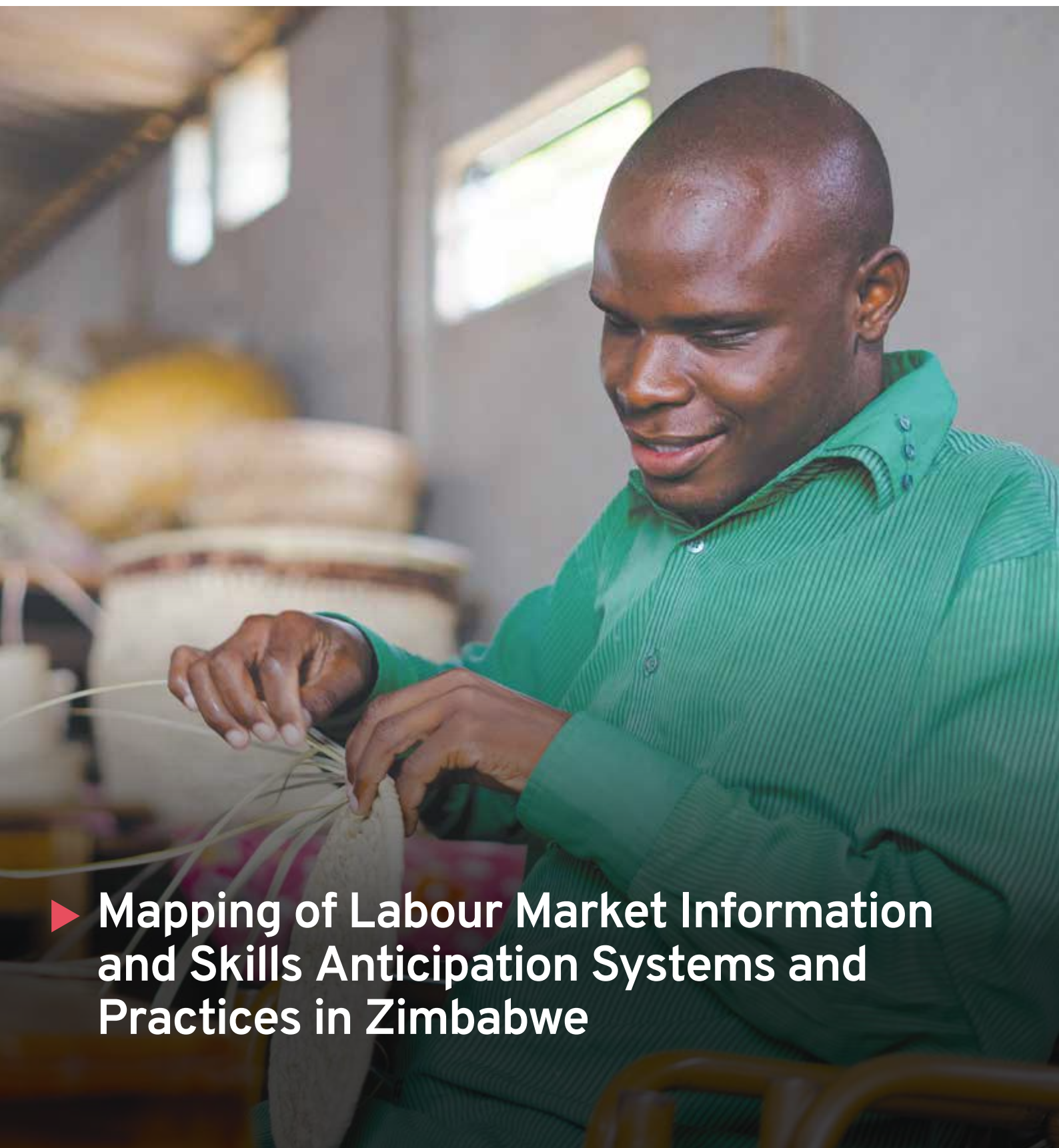




► Mapping of Labour Market Information and Skills Anticipation Systems and Practices in Zimbabwe

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► Abbreviations and Acronyms

ARLAC	African Regional Labour Administration Centre
AU	African Union
CESA 16–25	Continental Education Strategy for Africa 2016–2025
COPS	Canadian Occupational Projection System
CZI	Confederation of Zimbabwe Industries
DWCP	Decent Work Country Programme
EIASZ	Engineering Iron and Steel Association of Zimbabwe
EU	European Union
GoZ	Government of Zimbabwe
ILO	International Labour Organization
LEDRIZ	Labour and Economic Development Research Institute of Zimbabwe
LMDA	Labour Market Diagnostic Analysis
LMI	Labour Market Information
LMIS	Labour Market Information System
MHTEISTD	Ministry of Higher and Tertiary Education, Innovation, Science and Technology Development
MPSLSW	Ministry of Public Service, Labour and Social Welfare
NAMACO	National Manpower Advisory Council
NCSAR	National Critical Skills Audit Report
NDS1	National Development Strategy 1
NECF	National Economic Consultative Forum
NECs	National Employment Councils
NSSA	National Social Security Agency
NTT	National Task Team
PICES	Poverty Income and Consumption Expenditures Survey
SADC	Southern African Development Community
SIFA	Skills Initiative for Africa
TNF	Tripartite Negotiating Forum
TVET	Technical and Vocational Education and Training
UNESCO	United Nations Educational, Scientific and Cultural Organization
ZIMCHE	Zimbabwe Council of Higher Education
ZIMDEF	Zimbabwe Manpower Development Fund
ZIMRA	Zimbabwe Revenue Authority
ZIMSTAT	Zimbabwe Statistics Agency
ZNQF	Zimbabwe National Qualifications Framework

► Foreword

This report presents the findings of the mapping of existing Labour Market Information System (LMIS), practices and institutional arrangements. The objective was to map the existing data sources and providers, review current practices, capacities and institutional arrangements for labour market information (LMI) and skills anticipation as well as provide concrete recommendations for improvement of existing systems and structures.

The mapping was conducted under the framework of the Skills Anticipation component of the Skills Initiative for Africa (SIFA) Programme. SIFA (2019–2022) is a programme of the African Union Commission and African Union Development Agency (AUDA-NEPAD), assisted financially by the German Government and European Union. AUDA-NEPAD partnered with the International Labour Organization (ILO) to build the skills anticipation capacities of African Union Members States, as a means for improving the development of evidence-based skills policies, strategies and implementation.



In Zimbabwe, the programme was implemented under the guidance of an inter-ministerial and tripartite plus National Task Team (NTT) jointly chaired by the Ministry of Public Service, Labour and Social Welfare (MPSLSW), and Ministry of Higher and Tertiary Education, Innovation, Science and Technology Development (MHTEISTD). NTT members were drawn from the Ministry of Industry and Commerce, Employer and Worker Organizations, Zimbabwe National Statistics Agency (ZIMSTAT) and policy research institutions, including institutions responsible for the design, conceptualisation and provision of education and training.

The mapping extensively reviewed existing literature on labour market information and skills anticipation; policy and legislative documents and frameworks, labour force surveys, establishment surveys, state of skills and skills audit reports, and reports on Technical And Vocational Education and Training (TVET).

The mapping established, among other things, that Zimbabwe's LMI and skills anticipation system had a fragmented structure that hindered it from delivering expected results, and from ensuring more labour market responsive skills development. The mapping report's key recommendations include: constant review and development of the curricula in line with changing technological developments, the future of work, trade and globalization, mobility of skills and the central importance of digital skills and policy priorities for the different sectors.

This report forms the basis for work on the development of a *National Action Plan on Strengthening the LMI and Skills Anticipation System* which will be spearheaded by the NTT.

Aligned to the national development objectives, as outlined in the National Development Strategy (NDS1: 2021–2025), the ILO reaffirms its commitment to support the Government of Zimbabwe and its social partners to strengthen the Labour Market Information System with well-integrated skills anticipation processes that can generate relevant information to ensure skills development that are responsive to the labour market.

The support to strengthen the LMIS and skills anticipation system is part of the 2022–2026 Decent Work Country Programme (DWCP). The DWCP for Zimbabwe is promoting decent work as a key component of national and sectoral development plans by organising ILO knowledge, instruments, advocacy, and cooperation to serve the tripartite constituents in a results-based framework to advance the Decent Work Agenda. The DWCP for Zimbabwe is ILO's contribution to the 2030 Agenda and the work of the 2022–2026 United Nations in Zimbabwe under the United Nations Sustainable Development Cooperation Framework.

Hopolang Phororo
Director

ILO Country Office for Zimbabwe and Namibia

► Acknowledgements

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The ILO and the SIFA Project wish to thank Dr Gibson Chigumira, Mrs Evengelista Mudzonga, and Mr Archford Gandidzanwa for this comprehensive report on the status of the labour market information and skills anticipation system and practices in Zimbabwe, and all stakeholders who made invaluable contributions in the compiling and developing process (NTT).

Special appreciation goes to members of the National Task Team on strengthening the labour market and skills anticipation systems in Zimbabwe, which was composed of representatives from the Ministry of Public Service, Labour and Social Welfare; Ministry of Higher and Tertiary Education, Innovation, Science and Technology; Ministry of Industry and Commerce; Zimbabwe Congress of Trade Unions; Zimbabwe Federation of Trade Unions; Zimbabwe National Statistics Agency; Employers' Confederation of Zimbabwe, Confederations of Zimbabwe Industries; and the Zimbabwe National Chamber of Commerce with support from the National Manpower Advisory Council (NAMACO); National Employment Councils (NECs); the Labour and Economic Development Research Institute of Zimbabwe (LEDRIZ), and Zimbabwe Revenue Authority (ZIMRA). The NTT was co-chaired by Dr Dennis Murekachiro of the Ministry of Higher and Tertiary Education, Innovation, Science and Technology Development and Ms Vimbai Chiza of the Ministry of Public Service, Labour and Social Welfare.

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SIFA – Skill Anticipation Component
 International Labour Organization

► Executive Summary

The study focused on mapping of the existing LMIS and practices to establish the extent to which the system has institutionalized skills anticipation as an integral part of the national LMIS. The study extensively reviewed existing literature on LMIS and skills anticipation; local policy and legislative frameworks; labour force surveys; skills audit reports; state of skills; and TVET reports among other relevant documents. This helped the mapping of the skills development and anticipation landscape in the country. The study noted that relevant and reliable data is required for the LMIS to produce good quality LMI which consists of multiple flows of data on skills supply and demand from different sources, both quantitative and qualitative.

The concepts of LMIS and skills anticipation are discussed in detail in Section 2 to inform the mapping exercise. The study noted that LMI includes any information regarding labour demand (firms' and other organisations' interests in hiring workers) and labour supply (individuals' willingness to participate in the labour market, including searching for jobs and investments in their human capital through education and training, involving schools, public employment services and other stakeholders). Critically, LMI also involves the interaction between labour demand and labour supply, including jobs, hirings, wages and other working conditions. Skills needs anticipation on the other hand refers to a strategic and systematic process through which labour market actors identify and prepare to meet future skills needs, therefore helping to avoid potential gaps between skills demand and supply. Consequently, skills needs anticipation becomes an essential component of designing employment policies and strategies and development policies and plans where skills development planning is integrated into diverse policies including: investment, trade, environmental, fiscal, employment and industrial development.

The 2021 Labour Force Survey (LFS) showed that informal and non-agricultural sectors experienced a decrease in employment by 7.8% while employment in the agricultural sector also dropped significantly by 21.9%. The decrease in the employment rate is attributed to the decline in economic activity due to skills mismatch. There was a high demand for technological skills in most businesses as online trading became the preferred mode of transacting business. Unlike other countries¹ in the region Zimbabwe did not have a rapid assessment of skilling and reskilling needs arising from the effects of Covid-19. However, the ILO State of Skills Study (2019); United Nations Educational, Scientific and Cultural Organization (UNESCO) TVET Policy Review Report (2018)²; Zimbabwe National Qualifications Framework (2018)³; Zimbabwe Council of Higher Education (ZIMCHE); and Zimbabwe National Critical Skills Audit Report (NCSAR, 2018)⁴ provide useful insights on the status of skills and skills development in Zimbabwe. While the National Development Strategy 1 (NDS1, 2021–2025) adopted employment creation as a cross cutting theme, there is no recent systematic skills anticipation exercise to determine the skills required to deliver the Plan objectives apart from the 2018 NCSAR.

Section 3.1 highlights the primary institutions involved in labour market data collection. The study further noted other studies that demonstrate internal capacity to analyse and interpret LMI. However, the analysis has tended to focus on the historical employment and unemployment separation and the quality of employment without focusing analysis on the role of skills or skills mismatch in explaining the levels of unemployment. In addition, this study also noted that an analysis of past and current trends in employment and skills demand can be useful in anticipating future skills needs. This may entail identifying how key socio-economic trends and new technologies are changing the world of work and the demand for skills. Enterprise surveys conducted by the World Bank and the manufacturing and mining sector

1 i.e. https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/documents/publication/wcms_820597.pdf

2 <https://unesdoc.unesco.org/ark:/48223/pf0000366321>

3 <http://www.zimche.ac.zw/wp-content/uploads/2019/04/ZNQF.pdf>

4 <http://www.mhtheistd.gov.zw/?wpdmpo=zimbabwe-national-critical-skills-audit>

were carried out by the Confederation of Zimbabwean Industries and Zimbabwe Chamber of Mines, respectively and have the potential to generate unique demand-side data about skills needs and skills utilization in the specific sectors with a focus on skills needs anticipation.

The ILO (2019) observed that the TVET system in Zimbabwe is highly fragmented with no sector-wide plan to coordinate the interventions of multiple ministries and private institutions. The study further observed that the NAMACO, which advises the MHEISTD on skills issues faces challenges noted by Matanga, 2018 and UNESCO, 2019 which undermine its performance and inclusivity in social dialogue. These observations remain pertinent in discussions on the need for institutional coordination of functions in relation to anticipation of skills; social dialogue and mobilisation of resources to conduct studies and stakeholder consultations on skills needs anticipation.

In the situational analysis on skills mismatch the study drew insights from the 2018 NCSAR and the 2021 Zimbabwe Labour Market Diagnostic Analysis (LMDA)⁵, which observed that workers with secondary and higher education are more likely to participate in the labour market than workers with primary or no education. The LMDA further noted that, education does not seem to reduce the risk of unemployment. One reason given for this is that the skills acquired in Universities and TVET centres are not always relevant in the labour market. Another reason is that those with university diplomas are likely to wait longer for the right employment match, which increases the unemployment rate. Still, among workers who find a job, more educated workers have better opportunities in the formal sector.

On the governance of LMI and skill anticipation processes, the study noted and reviewed several legal and regulatory frameworks that govern and facilitate the collection of LMI. Section 4.3 highlights some of the gaps and challenges collected from the documents reviewed concerning the adequacy of TVET and skills anticipation policy in Zimbabwe, which are still relevant and need to be addressed. Regarding skills anticipation governance and operations, the study noted that high-quality and timely skills intelligence and anticipation is a powerful policy tool that helps in improving economic competitiveness and fostering social progress and equality through the provision of targeted skills training to all citizens. The development of the National Action Plan to strengthen the LMIS and skills anticipation needs to build on inputs from diverse stakeholders including the world of education and the world of work. Additionally, the National Action Plan should not only reflect on realistic and tangible actions that could be implemented to improve the LMIS and skills anticipation in Zimbabwe but should delve into the labour market and skills anticipation institutional framework and coordination arrangements as well as enhancing social dialogue mechanisms.

The study concludes with a set of recommendations that should inform the development of the *National Action Plan for Strengthening Labour Market Information and Skills Anticipation Systems in Zimbabwe*.

5 https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---sro-harare/documents/publication/wcms_819125.pdf



► Introduction

► 1. Introduction

The ILO, as part of its contribution to the achievement of the National Development Strategy 1 (NDS1 – Human Capital Development and Innovation Priority), in collaboration with the Government of Zimbabwe and its tripartite plus partners is implementing the SIFA Project focusing on skills anticipation. SIFA, a programme of the African Union Commission and AUDA-NEPAD with financial assistance from the German Government and European Union, has partnered with the ILO to build the skills anticipation capacities of the African Union (AU) Member States, as a means for improving the development and implementation of evidence-based skills policies and strategies. The Skills Anticipation Project aims to facilitate identification and anticipation of skills as an integral part of the national LMIS.

The implementation of the Skills Anticipation Project is being led by a NTT, which is constituted as a tripartite plus and inter-ministerial ten-member committee led by the MHTEISTD comprising members from the MPSLSW, the Ministry of Industry and Commerce, employer and worker organizations, the ZIMSTAT, policy research institutions, and academic institutions responsible for the design and conceptualisation of education and training provision.

As part of implementing the SIFA Project this study focused on mapping the existing LMIS and practices in order to establish the extent to which the system has institutionalized skills anticipation as an integral part of the national LMIS. The findings of the study will form the basis for the development of a National Action Plan that will guide the strengthening of current systems and practices with a view to improving the alignment of skills development to the skill and competency requirements of the labour market under the guidance of the NTT. This is expected to ultimately contribute to the overall SIFA objective of enhancing the employability of African youths.

1.2. Objectives of the Study

The main objective of the SIFA Project is to ensure the effective matching of skills supply and demand in the labour markets of targeted AU Member States through facilitating the identification and anticipation of skills as an integral part of national LMIS. This is important to ensure that skills supply and skills demand in labour markets can be matched effectively to help deal with unemployment challenges and threats especially among the youth. The mapping exercise provides an overview of the Zimbabwe LMIS, its data sources, its capacities and institutional arrangements. The following are the specific objectives of the study:

1. To map the existing data sources or providers;
2. To review current practices, capacities and institutional arrangements for LMI and skills anticipation; and
3. To provide concrete recommendations for the improvement of existing systems and structures.

1.3. Methodology

The study focused on an extensive document review to respond to the Terms of Reference. This involved reviewing documents in the public domain and documents solicited from key stakeholders. The study collected information from central government institutions, industry associations, research institutions, universities, training institutions and trade unions. The data collected helped in reviewing the current practices, capacities and institutional arrangements for LMI and skills anticipation and to provide concrete recommendations for the improvement of existing systems and structures. The study also benefited from inputs from the ILO representatives prior to the validation workshop as well as other stakeholders during the validation workshop.

1.3.1. Document Review

The study undertook extensive document review to inform the mapping of the existing LMI and skills anticipation systems and practices. This involved internet searches to identify relevant documents for review, collection of documents from government ministries and departments including policy documents and strategic plans; studies on skills needs assessments and anticipation and other country skills mapping and LMIS and Skills Anticipation Action Plans. Some of the documents reviewed include the following:

a. Survey Reports

Survey reports which were reviewed included the Zimbabwe Labour Force Surveys; Annual Statistics Reports from organisations such as the Public Services Commission; Poverty Income and Consumption Expenditures Survey (PICES); Zimbabwe Demographic and Health Surveys; Zimbabwe Manufacturing Survey; Zimbabwe Enterprise Survey; Zimbabwe Smallholder Agricultural Productivity Survey; and census documents. These surveys provided information about the available skills as well as the quality of the skills of Zimbabwean labour force. The survey instruments used in these surveys were analysed to see whether they included questions pertaining to skills needs and anticipation.

b. Policies, Strategies, Plans and Legislative Frameworks

Policies, strategies, plans and legislative frameworks were reviewed to identify whether the issues of skills in general and skills anticipation were provided for. Legislative frameworks which were reviewed include the Manpower Planning and Development Act (Chapter 28:02), Census and Statistics Act (Chapter 10:29), SADC Strategic Framework and Implementation Plan for the Development of TVET in SADC 2018–2027 and the NDS1. Documents from the following institutions were also reviewed:

- ▶ International Labour Organization (ILO);
- ▶ Ministry of Higher and Tertiary Education, Innovation, Science and Technology Development (MHTEISTD);
- ▶ Ministry of Public Service Labour and Social Welfare (MPSLSW);
- ▶ Ministry of Industry and Commerce;
- ▶ Zimbabwe National Statistics Agency (ZIMSTAT);
- ▶ Zimbabwe National Chamber of Commerce;
- ▶ Confederation of Zimbabwe Industries (CZI);
- ▶ Public employers – Public Services Commission; and
- ▶ Private employers – Employers Council of Zimbabwe.

1.3.2. Key Stakeholder Interviews

In addition to document reviews, key stakeholder interviews were conducted with the MPSLSW and other stakeholders who attended the mapping study validation workshop. Discussions with key stakeholders were based on questions to gain a deeper understanding of the current state of the LMIS or lack thereof and skills anticipation practices in Zimbabwe. The interview questions were informed by the review of literature on LMIS experiences and skills anticipation practices from around the world. Key stakeholders were also requested to identify gaps in the current system of collecting, storing and disseminating LMI as well as the activities that need to be incorporated in the development of an integrated LMIS. For example, the questions discussed with officials from the MPSLSW focused on whether the Ministry had any instruments to gather information on skills anticipation; processes for skills anticipation; how data concerning skills mismatch was captured; capacity to analyse LMI; coordination mechanisms among labour market actors; existence of social dialogue on skills needs and anticipation; templates that the Ministry had for the consolidation of LMI and the existence of any LMI portal currently being managed by the Ministry.

Discussions with the MHTEISTD focused on the system currently in place to identify the skills needs of industry players which will in turn inform curriculum development. Perspectives on skills needs assessment and skills anticipation were sought from labour unions, employer representatives, and social and economic dialogue conveners such as the National Economic Consultative Forum (NECF).

Analysis of the data gathered from the document reviews and key stakeholder interviews, informed the drafting of the mapping report. The first draft of the report was shared with the NTT members through the ILO Secretariat in preparation for the validation workshop. Comments and inputs received as feedback to the draft report further enriched the finalization of this report.

1.4. Limitations of the Methodology

The initially envisaged focus group discussions were not undertaken and the study ended up being informed by the document reviews and key stakeholder interviews. Initially there was a poor response rate from targeted key stakeholders who were contacted to provide the information required prior to the production of the first draft. Regardless, this short coming was overcome as most of the targeted stakeholders attended the validation workshop and provided very rich insights in their responses to the presentation of the draft report. Further inputs came from robust discussions between the NTT and the Inter-Ministerial Committee for the development of TVET Policy, who attended the validation meeting. In particular there were extensive discussions on the prioritization of recommendations and issues to be considered in the National Action Plan. The inputs from the four-day validation workshop were incorporated into this report. Side consultation meetings were held with some of the participants from the validation workshop to fill in the gaps on the status of skills needs assessment and anticipation in Zimbabwe and the role of their respective institutions in these processes.





► LMIS and Skills Anticipation: Key Concepts

► 2. LMIS and Skills Anticipation: Key Concepts

LMI includes any information regarding labour demand (firms' and other organizations' interests in hiring workers) and labour supply (individuals' willingness to participate in the labour market, including searching for jobs and investments in their human capital through education and training, involving schools, public employment services and other stakeholders). Critically, LMI also involves the interaction between labour demand and labour supply, including jobs, hirings, wages and other working conditions. In this context a LMIS will include all activities involving LMI, such as the collection, processing, storing, analysis and dissemination of data, and the information that is generated (Martin, 2019)⁶. Therefore, the use of all available data sources on LMI will provide a deeper and broader understanding of developments and trends in the labour market. However this requires coordination of information flows and data and information sharing among different institutions. An important function for a LMIS is the integration of many different data sources into one comprehensive and usable data base or set of linked data bases⁷.

Martins (2019) further observed that labour markets are hungry for information. Firms want to identify and hire workers that fit well with their vacancies; workers are keen to know about the best opportunities for their labour; students and governments want to invest in skills that will offer the highest private and public returns; competences are evolving; and citizens are interested in the latest developments and general outlook for work and employment in their countries. LMI must be analysed to suit the needs of different users. For example, development policy planners require complex levels of detail, while jobseekers may only require more general information about opportunities in the sectors and locations in which they wish to work. Thus, the LMIS needs to respond effectively to different users' needs and the information has to be disseminated in a timely fashion. New technologies, those based on the internet, as well as new sources of (big) data, including administrative registers, are offering growing opportunities for public and private organisations to increase timely delivery, accuracy and actionability of information. Having a well performing LMIS requires inputs from multiple stakeholders with a systematic and coordinated approach.

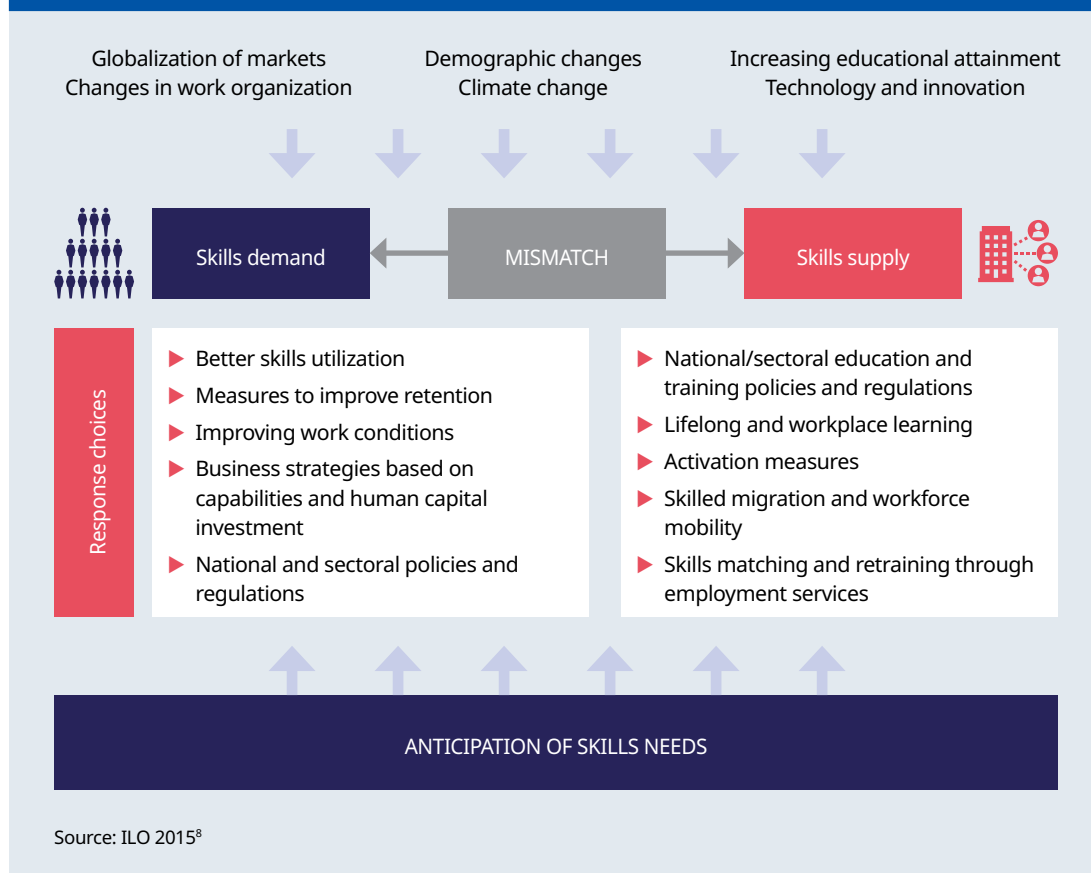
There are various methods and tools to disseminate LMI. Publications and websites are the most common information tools to communicate with the public. They provide information on the labour market situation in a user-friendly manner and target people with no special knowledge of labour market analysis. General information through the internet and other tools should be accompanied by guidance services provided by public employment services and career counsellors at schools specifically targeting jobseekers and young people. Guidance services can reach out to the people most in need of new and updated skills, helping them to make informed learning and employment choices. Information on labour demand and supply should also reach business associations and employers to support their plans for human resource development, adjustment of commercial strategies and investment plans (European Training Foundation, ETF, 2017).

Many countries including Zimbabwe are experiencing a persistent gap between the skills needed in the labour market and those offered by the workforce. Skills gaps are persisting despite increased spending on education and training and increasing educational attainment. The Manpower Group Survey (2013) observed that globally, around one in three employers say they have trouble filling vacancies because of the lack of appropriately skilled applicants. Figure 1 that follows shows global drivers of change leading to mismatches in skills demand and supply.

⁶ Pedro. S. Martin (2019), 2020 Labour Market Vision: Labour Market Information Systems for the New Decade, SOCIEUX+ Expertise on Social Protection, Labour and Employment- http://socieux.eu/wp-content/uploads/2020/06/Labour_Market_Vision_EN.pdf

⁷ See https://ec.europa.eu/eures/public/living-and-working/labour-market-information_en

Figure 1: The ILO approach to skills needs anticipation



Several factors influence the evolution of skills demand and supply which, if left unaddressed, contribute to skills mismatch in the future. As reflected in Figure 1 these include demographic changes, technology development and innovation, and climate change among other factors which may be specific to a country's context. Demographic changes manifest in an aging population or large numbers of young people entering the labour market every year. These changes require that young people have the appropriate skills to meet investors' and employers' requirements in terms of jobs that they plan to create, while older workers should continue to learn and upgrade their skills.

The World Economic Forum (2019)⁹ observed that the qualifications achieved in schools, colleges and universities; the brand of an educational institution or an employer; and the social networks of a potential job applicant are all signals currently used to indicate potential fits between individuals' capabilities and job opportunities in the labour market. These proxy signals have their origin in shortcomings in the capacity to measure and evaluate the actual skills, knowledge, behavioural qualities and abilities that individuals have gained throughout their lives.

The World Economic Forum (2019) further observed that there are three key reasons why a suboptimal system of skills proxies tends to contribute to both labour market inefficiencies as well as social inequalities. First, learning and employment ecosystems are currently built for a world of work that is no longer a reality. They are premised on the assumption of linear careers largely using a traditional life model of 'learn, do, retire'. That outdated model is too rigid for the current and future needs of the labour market.

8 ILO (2015) Guidance Note: Anticipating and Matching Skills and Jobs, Skills and Employability Branch Employment Policy Department, https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---ifp_skills/documents/publication/wcms_534307.pdf.

9 Strategies for the New Economy Skills as the Currency of the Labour Market'(2019)

Second, large-scale changes to job and skill demands in the Fourth Industrial Revolution are bringing fresh challenges to an already struggling system for identifying job-fit and matching individuals to opportunities. As automation and work converge, skills gaps are set to change at a faster pace and at a greater volume leading to both talent shortages and job redundancies. To remain relevant and employable, workers are faced with the need to re-evaluate and update their skillsets; companies face a pressing need for innovative talent sourcing, matching and development strategies; and educators face pressure to update the focus of their courses and offerings. Consequently, there is a vital need for more efficient proxies that can relay the skills that individuals acquire throughout the course of their lives.

Third, today's proxy-based system of determining job-fit often exacerbates socio-economic inequalities. For example, success in primary, secondary and tertiary education remains one of the strongest predictors of long-term socio-economic inclusion and has a demonstrably negative knock-on effect on social cohesion.

Technology is also evolving faster than ever, changing the skills needed for jobs and shortening the life cycle of those skills. There is emerging evidence of a bifurcation of the workforce into those with in-demand skills versus those with high-supply skills (Manpower Group, 2015)¹⁰. Thus, technology development and innovation increase the demand for higher-level skills and accelerate the rate of change in skills demand. Science, Technology, Engineering and Mathematics and Information and Communications Technology skills are becoming more important not only among the most highly skilled who contribute to innovation, research and development, but also among skilled workers who are instrumental in the operation and maintenance of new technologies. Similarly, the influence of technology and innovation is felt beyond the high-tech industries themselves and now include other areas such as services and customer care (ILO, 2015).

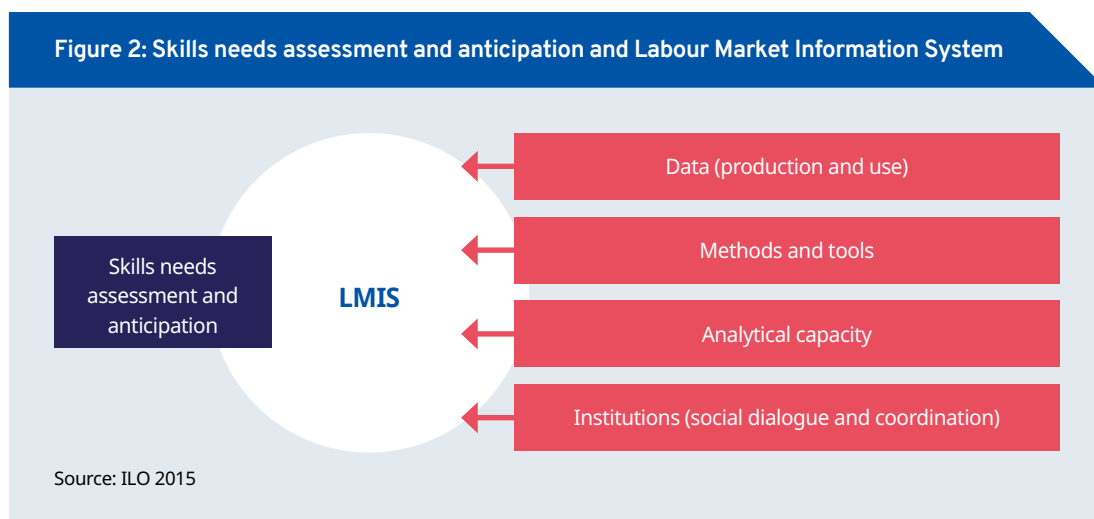
Climate change and the transition to the green economy influences skills demand through the introduction of new green technologies and new market opportunities in green economic activities. The country's National Determined Contribution reports highlight areas of intervention in the green transition that require new skill sets. These processes change the skills requirements within existing occupations, giving rise to new occupations and skills needs, and increase the need for skills retraining and upgrading, including environmental awareness. In the context of these changes, and in order to inform the education and training system far enough ahead of time to create appropriate training programmes, the systematic anticipation of skills needs becomes essential. Only by anticipating skills needs in this way can informed and strategic responses be developed to meet skills challenges and prevent skill mismatch (ILO, 2015).



10 https://www.manpowergroup.com/wps/wcm/connect/db23c560-08b6-485f-9bf6-f5f38a43c76a/2015_Talent_Shortage_Survey_US-lo_res.pdf?MOD=AJPERES

2.1. Skills Needs Anticipation

There is no one agreed definition of skills needs anticipation, and the term is often used interchangeably with “early identification of skills needs”, “skills needs assessment” or “forecasting”. In a broad sense, skills needs anticipation refers to activities to assess future skills needs in the labour market in a strategic way, using a consistent and systematic method (ILO, 2015). It is a strategic and systematic process through which labour market actors identify and prepare to meet future skills needs, thus helping to avoid potential gaps between skills demand and supply. Skills anticipation enables training providers, young people, policy makers, employers and workers to make better educational and training choices, and through institutional mechanisms and information resources leads to improved use of skills and human capital development (ILO, 2015). Skills needs anticipation aims to provide information to all labour market actors about potential future skills needs and imbalances, so that they can make decisions, develop measures and take actions with the intention to meet the needs and avoid the imbalances. Skills needs anticipation then becomes an essential component of designing employment policies and strategies and development policies and plans where skills development planning is integrated in diverse policies including: investment, trade, environment, fiscal, employment and industrial development. Therefore, anticipation of future skills requirements becomes a key preventative measure to avoid skills mismatch and anchors Zimbabwe's training and skills development ecosystem. Figure 2, shows that skills needs assessment and anticipation is a key component of the LMIS.



As shown in Figure 2, skills needs anticipation can be broken down into several key elements, namely: data, methods and tools, analytical capacity and institutions. The production of information on current and future skills needs is a necessary, but not sufficient condition, for effective skills anticipation and matching. The concept of anticipation is broader, requiring not only the production of results from analytical models, but the analytical expertise to interpret and validate them, and the capacity to translate them into the development of practical policies. Implementation of these steps requires agreed and coordinated responses by a range of stakeholders.

Social dialogue is the cornerstone of skills needs anticipation as it is critical for informed decision making as well as for the implementation of findings and recommendations. Therefore, skills anticipation should include appropriate institutional mechanisms and procedures for generating constructive responses based on the data gathered. The approach promoted by the ILO is to identify relevant data and tools; translate the data into indicators, trends and scenarios; analyse these outputs and prepare strategies in conjunction with key stakeholders; and establish institutional arrangements that are conducive to matching demand for, and supply of, skills through systematic social dialogue as shown in Figure 3.

Figure 3: Approach systematic social dialogue on skills needs anticipation



2.2. Challenges for the Anticipation of Skills Needs

The ILO (2015) noted that there are several challenges in the development of systems to anticipate skills needs, including the provision of adequate and coherent data, the identification of the most appropriate methodologies, and the availability of institutional capacities and expertise. These challenges were noted as being more pronounced in developing and emerging economies. Besides these issues, the large share of the informal economy in many developing countries poses obstacles to the development of skills anticipation systems. Martins (2019) observed that, paying due attention to the informal and rural sectors can be very important. He further argued that these domains represent large percentages of the workforce in most sub-Saharan countries, sometimes as high as 90%. Further challenges to the establishment of successful skills needs anticipation include achieving and maintaining the commitment of all stakeholders and establishing ways to incorporate information from the grass roots within a holistic approach. The ILO (2015) further noted that the results from skills anticipation exercises need to be interpreted, transmitted into policy formulation mechanisms, and implemented in practice, all of which requires appropriate institutional mechanisms and capabilities.



2.3. Skills Anticipation Governance and Operations

High-quality and timely skills intelligence and anticipation is a powerful policy tool, that helps in improving economic competitiveness and fostering social progress and equality through the provision of targeted skills training to all citizens. Reliable information on current and future labour market trends and skill needs is critical in responding to a rapidly changing world of work. Skills governance refers to the involvement of key stakeholders in the generation, dissemination and use of such labour market and skills intelligence, to support employers, citizens, education and training providers, and other stakeholders in making informed choices. A central feature of successful skills governance is consensual dialogue among key stakeholders to bridge the worlds of education and work (CEDEFOP, 2020)¹¹.

Strong governance arrangements are essential for well-functioning skills systems and better skills outcomes. This should be underpinned by improvements in the collection and analysis of labour market and skills intelligence. Governing skills systems effectively and efficiently can help reduce potential policy gaps and overlaps, facilitate the efficient allocation of resources, and increase the likelihood of successful policy implementation. Policies that aim to strengthen the skills of youth, foster greater participation in adult learning, or make better use of people's skills can only realise their full potential if accompanied by robust governance arrangements.

Skills anticipation is at the intersection of multiple agencies and policy fields, including education, labour market, innovation and industrial and migration policies, hence the need for strong institutional coordination and stakeholder dialogue. The coordinating framework and social dialogue on skills development and anticipation in Zimbabwe needs to be strengthened. Governance of skills policies necessitates the involvement of a wide variety of actors, including government, Ministries, Departments and Agencies, as well as an array of non-governmental stakeholders including employers, employees, associations, unions, teachers, training providers, career guidance services and students. Skills policies and anticipation are developed in the realm of substantial uncertainty as they are significantly impacted by automation, digitalization and changes in the world of work brought about by pandemics such as Covid-19.

To help policy makers navigate the complex dynamics of the governance of skills policies, there is a need for a skills development and anticipation strategy with agreed key pillars. For example, the Organisation for Economic Cooperation and Development Skills Strategy (2019) identified four important building blocks to govern skills systems effectively: 1) promoting coordination, cooperation and collaboration across the whole of government; 2) engaging stakeholders throughout the policy cycle; 3) building integrated information systems; and 4) aligning and coordinating financing arrangements. Together, these building blocks established a strong basis upon which policies for developing and using skills are built.

Thus, the development of the National Action Plan to strengthen the LMIS and skills anticipation needs to build on inputs from diverse stakeholders including representatives from education and training institutions and employer organisations. The action plan should not only reflect on realistic and tangible actions that could be implemented to improve LMIS and skills anticipation in Zimbabwe, but should also explore skills anticipation governance and operations. The skills needs dictated by twin digital and green transition and Covid-19 and its economic impact should also inform the development of the action plan for developing a robust LMIS and skills anticipation strategy.

11 European Centre for the Development of Vocational Training (CEDEFOP, 2020) Strengthening skills anticipation and matching in Bulgaria, <https://files.eric.ed.gov/fulltext/ED610599.pdf>



► **Overview of the Zimbabwean Labour Market**

► 3. Overview of the Zimbabwean Labour Market

Labour force participation and employment statistics are highlights of the skills that individuals hold in the country. The Zimbabwean 2021 third and fourth quarter LFS presents the labour statistics that show employment rates in different sectors of the economy, as well as in different age groups. These statistics are key in assessing the skills level in the identified sectors of the economy and age groups. There was a decrease in the total number of people employed from the third quarter into the fourth quarter of 2021 by 9.4%. This decrease came from various sectors of the economy. The informal and non-agricultural sector experienced a decrease in employment by 7.8%, while employment in the agricultural sector dropped significantly by 21.9%. The decrease in the employment rate is attributed to the decline in economic activity due to skills mismatch.

Zimbabwe, like any other country, was affected by Covid-19 which led to a shift and increase in skills demanded in the economy. The 2021 LFS indicated that sectors mostly affected by Covid-19 and who experienced significant job losses were the wholesale and retail trade; sale and repair of motor vehicles and spares (18.4%); the agricultural sector (16.6%); mining and quarrying (15%); construction (11.9%); manufacturing (10.9%); and households as employers of household personnel. This was because most of these sectors were forced to reduce their operational capacity to combat the spread of Covid-19. There was high demand for technological skills in most businesses as online trading became relevant for businesses to continue trading.

Several studies on rapid assessment of skilling and reskilling needs arising from the effects of Covid-19 were carried out in selected African countries (Cameroon, Zambia, Kenya, Namibia, Ghana, and South Africa). The studies found that the Covid-19 pandemic spiked the demand for labour and special skills including personal protective equipment (PPE) manufacturing, digital skills, e-commerce activities, and health care services in contact tracing. Reskilling in these identified areas is beneficial even in the long-term. Zimbabwe cannot be spared by the effects of Covid-19, and its labour force also requires reskilling for effective operations during the Covid-19 pandemic. The 2021 LFS also revealed that unemployment worsened in the rural areas (60%) compared to the urban areas in Zimbabwe.

The MHEISTD, other Ministries and organisations offering TVET are making efforts to develop new curricular in anticipation of the changing labour market needs. The Zimbabwe Manpower Development Fund (ZIMDEF) finances the training of apprentices in Zimbabwe which provides skills development for the labour force. TVET systems contribute to the empowerment and skills development of communities. There is need for restructuring the programme for improved skills development in Zimbabwe (TVET, 2018). Employment agencies also play a critical role in matching demand and supply of skills in the country through collecting skills requirements from employers and advertising them in order for people to apply for the jobs. However, there are no defined platforms that automatically identify sectors where the skills are required and where job seekers must apply for jobs. There is therefore a need to develop such platforms including software that make it easier for people to match their skills with those required by employers.

The ILO State of Skills Study (2019) identified key challenges and suggested a way forward with regards to the TVET system as shown in Annexes 1 and 2. While some of the identified challenges and suggested way forward are being addressed, they remain relevant in informing the development of a National Action Plan for improving and strengthening LMI and skills anticipation system in Zimbabwe.

3.1. Capacity for Data Collection, Analysis, and Interpretation

3.1.1 Data Collection

There are a number of organisations that collect data on labour statistics in Zimbabwe. These include the MPSLSW, ZIMSTAT, the ILO Zimbabwe, labour research institutions like the Labour and Economic Development Research Institute of Zimbabwe (LEDRI), Business Membership Organizations, Associations and Unions, and ZIMRA among other institutions. Table 1 provides the main sources of LMI in the country including the reports and data bases produced.

Table 1: Institutions that collect labour statistics

Institution	Publication or Database produced
Zimbabwe Statistics Agency (ZIMSTAT)	Labour Force Surveys, Price Income Consumption and Expenditure Surveys (PICES), Zimbabwe Demographic and Health Surveys; Census Reports etc.
Ministry of Public Service, Labour and Social Welfare (MPSLSW)	Annual Statistics Reports
International Labour Organization (ILO)	Country Specific Labour Statistics
National Social Security Agency (NSSA)	Annual Statistical Reports
Business Membership Organizations; Labour and Farmers Unions and Industry Associations	Annual Sectoral Reports/Surveys i.e., Manufacturing Sector Surveys
Zimbabwe Revenue Authority (ZIMRA)	Annual Reports and Return forms

Data collected at national level is mainly published through censuses and labour force surveys where descriptive statistics are given. One big limitation with this data is that it is historical and does not include forecasts. In addition, the labour force surveys do not include a module on skills mismatch resulting in a missing link on skills anticipation.

This is further worsened by the lack of a national central repository on LMI as information is currently housed in the various institutions such as ZIMSTAT, NSSA, ZIMRA, NECs, Line Ministries, Labour Unions and Industrial Associations, private employment agencies, among others. The coordination of these diverse sources of LMI is weak; definitions and concepts used and the formats through which the data is captured and stored are not harmonized for easy comparability. The MPSLSW receives monthly returns submitted by private employment agencies; administers the retrenchment database (Case Management System) as well as the migrant resource centre which are critical sources of LMI. However, the challenge with this data is that some of it is manually recorded making it difficult to consolidate for further analysis. NSSA and NECs collect labour statistics in formats aligned to their intended use and may not be aligned to international standards and consistent with formats used by ZIMSTAT. There is need for MPSLSW and ZIMSTAT to work together in developing standardized templates for the collection of LMI by the diverse labour market actors that are expected to input into the LMIS.

Effective collaboration and coordination of the generators and collectors of LMI is a precondition for establishing an efficient and well-functioning LMIS. In planning the development of an integrated LMIS, enhancing capacity to collect data will be critical to circumvent constraints that can hamper the effective functioning of the LMIS. Data limitation is one such constraint that inhibits in depth analysis of complex issues such as informality and employment protection and availability of high frequency data on employment and unemployment. Data limitations can also emanate from other constraints

such as resource scarcity, limited analytical capacity and structural factors which need to be addressed. Institutional capacities of workers' and employers' organizations need to be strengthened to enable them to effectively collect data that feeds into the LMIS and facilitates LMI analysis to support policy and decision-making.

One of the strategic objectives enunciated in the MHEISTD Strategic Plan (2019–2023)¹² is “to educate graduates for the 21st century market with strong academic qualifications and strong employability skills.” Skills anticipation and matching becomes critical to enhance employability of graduates particularly the young people coming out of the education system. The MHEISTD has identified the following key strategies to achieving the strategic objective:

- i. Develop and implement the Zimbabwe National Qualifications Framework (ZNQF);
- ii. Implement ZNQF Statutory Instruments SI 132, SI 133, SI 137 and SI 140 of 2018;
- iii. Conduct National Critical Skills Audits;
- iv. Implement programmes addressing outcomes of the National Critical Skills Audits;
- v. Review and redirect curriculum towards producing graduates with relevant knowledge, attitudes and skills;
- vi. Promote, register, monitor and regulate the quality of Higher and Tertiary Education Institutions (HTEIs) as stipulated in the Manpower Planning and Development Act (28:02) 1995 and the ZIMCHE Act (25:27) 2006; and
- vii. Strengthen administration of TVET assessments including trade tests and national examinations.

To assess the achievement of these strategies and their implications on skills needs assessment and anticipation requires effective data collection, particularly through skills audits; tracer surveys; data base on outcomes of TVET assessments including trade tests and knowledge; and attitudes and skills exhibited by the trainees post their training. Additionally, surveys conducted by Industrial Associations and Employer Organizations have been silent on the extent of skills mismatches and future skills requirements. This information is critical to inform the development of curricula and to educate graduates for the 21st century labour market.

The recent Engineering Iron and Steel Association of Zimbabwe (EIASZ, 2022–2026) Strategic Plan demonstrates the importance and the potential capacity for industrial associations to collect information on skills needs and gaps within their specific sector that feeds into the LMIS and also establish the skills mismatches and anticipated skills needs within the sector. Annexure 3 shows the major skills identified by the EIASZ required in the engineering, iron and steel sub-sector. Studies that establish the skills gaps and anticipated future skills at sectoral and national level are not being done regularly to inform skills development in the country.

3.1.2 Capacity for Data Analysis and Interpretation

Capacity to analyse skills data is critical as it answers several policy questions. These include the need to understand qualifications and skill profiles of Zimbabwean workers by industry and occupation; the number of jobs that require the different categories of skills; skills that are required or lacking in the labour market; skills that are more important to develop; the education and training programmes that need revision in order to appropriately equip people with requisite skills; the need to introduce adult retraining programmes; population groups most affected by mismatches; and generally how Zimbabwe compares with other countries on the matter of skills mismatches. In addition, firms want to identify and hire workers that fit well with their vacancies; workers are eager to know about the best opportunities

¹² See <http://www.mhteistd.gov.zw/>

for their skills and qualifications; and students and governments want to invest in skills that will offer the highest private and public returns.

A functional integrated LMIS and capacity within labour market actors to analyse LMI is critical for effective evidence-based decision and policy-making. Generally, there are analytical capacity gaps which vary across different labour market actors. As the LMIS is being developed there is need for capacity building that responds to the needs of the different labour market actors. Analysis of some historical LMI has been done mainly by research institutions, Business Membership Organizations like the CZI, the Chamber of Mines, Zimbabwe National Chamber of Commerce, Labour and Farmers Unions; and Associations such as the Association of Small and Medium Scale Enterprises; and the Informal Sector Association within the context of their requirements. However, capacity to use predictive models for skills anticipation is generally lacking across the board.

Examples of some analysis that have been produced utilizing available LMI include the study on the “Employment Creation Potential Analysis by Sector”. This study focused on employment, wages and labour productivity; inequality and poverty; education and labour demand; population growth and labour supply; economic growth and recent changes in employment; and wages and youth dividend. The study also outlined major challenges to growth and job creation and examined potential strategies for employment creation¹³. The analysis did not, however, cover skills anticipation. Similarly, the study on employment, unemployment and informality in Zimbabwe focused on concepts and data for coherent policy-making¹⁴ and did not cover skills anticipation. The paper concluded that the unemployment rate alone is only of limited use to assess a country's labour market situation since it does not reflect the quality of employment. The SPIRES Zimbabwe DREAMS Job Demand Market Analysis is yet another study that laid out a strategy to support youth employment and microenterprise development programmes that place adolescent girls and young women in jobs or self-employment, building on a comprehensive job demand market analysis tailored to the situation of adolescent girls and young women in Zimbabwe¹⁵. In this study employers' skill requirements were noted as a barrier to accessing employment opportunities. The study further observed that the skills of youth, in relation to available local economic opportunities, remain a crucial factor in driving employability.

While the studies cited above and similar analysis that has been done by research institutions and Business Membership Organizations demonstrate some capacity to analyse and interpret LMI, skills anticipation has largely been missing in these studies. In this regard, the collection and analysis of data on skills anticipation should be a core component of the LMIS that is being developed. Building in-country capacity for skills needs assessment; skills forecasting techniques; and use of the Skills For Trade and Economic Diversification methodology to anticipate skills needs in the country becomes critical. Skills anticipation needs to be mainstreamed in templates and questionnaires of institutions that undertake labour market surveys. This may require organizing awareness workshops for labour market actors on the importance of skills needs assessments and anticipation; and sharing of customized templates to collect data on skills mismatches and skills anticipation. For example, there is a need for capacity building on the use of big data sets, advanced statistical and econometric methods to analyse LMI, and anticipation of future skills needs for the country.

The country can also leverage on the presence of the African Regional Labour Administration Centre (ARLAC), an inter-governmental institution based in Harare with a mandate to strengthen labour administration systems in English speaking African member countries through training, research, consultancy and advisory services. The MPSLSW can make a request to the ILO and the ARLAC to provide training on the analysis of LMIS and skills anticipation methodologies and practices.

13 https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---sro-harare/documents/publication/wcms_619735.pdf - Paper was developed by the Labour and Economic Development Research Institute of Zimbabwe (LEDRI) for ILO Country Office for Namibia and Zimbabwe.

14 [https://unstats.un.org/unsd/gender/Ghana_Jan2009/Background%20doc%20for%20paper%2039%20\(ILO-WP-90\).pdf](https://unstats.un.org/unsd/gender/Ghana_Jan2009/Background%20doc%20for%20paper%2039%20(ILO-WP-90).pdf) - research carried out by Malte Luebker in collaboration with the Central Statistical Office, Harare, Zimbabwe.

15 USAID (2018) Zimbabwe Employment Market Opportunities Analysis https://www.marketlinks.org/sites/default/files/resources/aspires_zimbabwe_employmnt_market_opp_analysis.pdf

Data analysis is further constrained by the absence of a functional LMIS which consolidates LMI from different sources. Zimbabwe is lagging behind many countries in the world that have already received support from the ILO to develop and operationalize their LMIS. In addition, the Southern African Development Community (SADC) Member States committed to produce reports on LMIS on a bi-yearly basis to feed into a regional repository hub. Zimbabwe, however, cannot produce this report in the absence of a functional LMIS. Zimbabwe can also draw lessons from LMIS platforms such as the European Union (EU) Skills Panorama website launched in 2012 that presents quantitative and qualitative information on short- and medium-term skills needs, skills supply and skills mismatches in the EU¹⁶.

The EU Skills Panorama is an online tool providing central access to data, information and intelligence on skills needs in occupations and sectors. It provides a European perspective on trends for skills supply and demand and possible skills mismatches, while also providing information about national data and sources. The EU Skills Panorama is managed by Cedefop <http://skillspanorama.cedefop.europa.eu/en>. In Canada, the Canadian Occupational Projection System (COPS) has been producing analytical outputs and LMI for nearly 30 years. The outputs of COPS are widely available to policy and labour market analysts. More importantly, COPS disseminates LMI to the public through hard copy or online publications¹⁷.

16 <https://www.eurofound.europa.eu/observatories/eurwork/industrial-relations-dictionary/eu-skills-panorama#:~:text=The%20EU%20Skills%20Panorama%20is,mismatches%20in%20the%20European%20Union>.

17 <http://occupations.esdc.gc.ca/sppc-cops/w.2lc.4m.2@-eng.jsp>

3.2. Key Data Sources for Skills Anticipation

Table 2 demonstrates some sources of publicly available LMI. For example, ZIMSTAT collects and publishes data and indicators which provide information on various aspects of the labour market including the Labour Force and Child Labour Survey. Unemployment statistics provided by ZIMSTAT and job vacancies data recorded by public employment agencies, along with job advertisement data from print and electronic media, directly reflect which occupations and skills are in demand, and which skills are currently available among jobseekers but are not being utilized. Further information and labour market indicators can be derived from household surveys carried out by ZIMSTAT (i.e. PICES), the national accounts, education statistics, demographic indicators, tracer studies, enterprise surveys and other administrative data sources (e.g., ZIMRA tax and NSSA databases). Information on the structure of the population by age, education and labour force status, and the sectoral and occupational structure of employment reflected in the labour force surveys and national census reports are key data sources for skills needs anticipation. One observation from the data collected by Business Member Organizations, NSSA and World Bank is that it mainly focuses on LMI and is silent on skills anticipation issues.

An analysis of past and current trends in employment and skills demand can be useful in anticipating future skills needs. This may entail identifying how key socio-economic trends and new technologies are changing the working tasks and the demand for skills. Enterprise surveys conducted by the World Bank and manufacturing and mining sector surveys carried out by the CZI and the Zimbabwe Chamber of Mines, respectively, have the potential to generate unique demand-side data about skills needs and skills utilization in the specific sectors if focus is targeted on skills needs anticipation. Tracer studies and surveys among graduates of training programmes can also be a rich source of key insights into the utilization of qualifications and skills attained and skills imbalances in the labour market. They are primarily designed to obtain feedback on how graduates use their qualifications and to what extent their training meets employers' needs. They would provide direct, first-hand information about current skills gaps and recruitment difficulties, training needs and short-term hiring intentions.

Table 2: Publicly available data on skills availability in Zimbabwe

Data Source	Labour Indicators Covered	Survey Recurrent Period	Survey Type	Methods of Disaggregation	Data Availability	Data Custodian
Poverty Income and Consumption Surveys (PICES)	Unemployment, Percentage of paid and non-paid employees, Proportion of income from wage employment, Non-farm family business income, Non-farm family business, Remittances income, Level of education.	Five years since 2012 However, four waves of Covid-19 ensue PICES were carried out since July 2020	National Representative	Gender, Province, Residence (Rural or Urban)	Summary reports available online and in hard copies. Raw data available upon request.	ZIMSTAT
Labour Force and Child Labour Survey	Unemployment, Under 15 years (un)employment (child labour), youth (un)employment, Labour Force participation rate, Average income, Level of education, Informal employment, Years not in education, Training or employment, Labour migrants, Work related injuries, or illnesses.	Five-year interval from 1994 to 2019. However, quarterly surveys conducted each year since 2021.	National Representative	Gender, Province, Residence (Rural or Urban), Sector of employment, Industry of employment, Country of origin (for migrant workers)	Summary reports available online and in hard copies. Raw data available upon request.	ZIMSTAT
Zimbabwe Demographic and Health Surveys	Health status of the work force, Type of work, Average salary, Level of education.	Five-year intervals	National Representative	Gender and industry employed	Summary Reports available online and in hard copies. Raw data available upon request.	ZIMSTAT and ICF International

Data Source	Labour Indicators Covered	Survey Recurrent Period	Survey Type	Methods of Disaggregation	Data Availability	Data Custodian
Census	Level of education, Informal employment, Years not in education, training or employment, Labour migrants, Labour force characteristics for those aged ten years and above, School attendance and level of education attained by all household members aged 3 years and above, Current attendance for those aged 3 to 24 years.	Ten-year intervals	National Representative	Gender, Province, Residence (Rural or Urban), Sector of employment, Industry of employment, Country of origin (for migrant workers)	Summary reports available online and in hard copies. Raw data available upon request.	ZIMSTAT
NSSA Statistical Reports	Labour-related welfare statistics such as occupational injuries and diseases, Pensions and other benefits, Admissions and discharges. These are only for formally employed workers.	Annually	National Representative	Gender, Industrial sectors, Province, Residence (Rural or Urban)	Summary reports available online and in hard copies.	NSSA
Zimbabwe Manufacturing Survey	Number of permanent full-time employees, Number of temporary employees, Formal training offered.	Annually	National Representative	Gender, Sector, Region, Province	Summary reports available online and in hard copies.	CZI

Data Source	Labour Indicators Covered	Survey Recurrent Period	Survey Type	Methods of Disaggregation	Data Availability	Data Custodian
Zimbabwe Chamber of Mines	Number of permanent full-time employees, Number of temporary employees, formal training offered, Labour Productivity, Skills Availability.	Annually	National Representative	Gender, Province, Residence (Rural or Urban), Sector of employment, Industry of employment, Country of origin (for migrant workers).	Summary reports available online and in hard copies.	Zimbabwe Chamber of Mines
Zimbabwe Enterprise Surveys	Number of permanent full-time employees, Number of temporary employees, Formal training offered.	Last survey carried out in 2016	National Representative	Gender, Production and non-production, Skilled and unskilled, Sectoral.	Summary reports available online and in hard copies.	World Bank
Zimbabwe Smallholder Agricultural Productivity Survey	Unemployment, Percentage of paid and non-paid employers, Proportion of income from wage employment, Non-farm family business income, Non-farm family business, Remittances income, Level of education.	Five-year intervals	National Representative	Gender, Province, Residence (Rural or Urban).	Summary reports available online and in hard copies. Raw data available upon request.	World Bank and ZIMSTAT

In addition to the institutions identified in Table 2 there are several other institutions that have an interest in skills development which also provide useful administrative data that informs skills needs anticipation. These institutions include various government ministries and agencies, education and training institutions, and employer and worker organizations as well as Business Membership Organizations. The functions of the various institutions in the LMIS should ideally be complementary to one another in order to ensure: good coverage and dissemination of data; multifaceted and multipurpose analytical outputs; and translation of findings into policy and practice. Institutional coordination of functions in relation to anticipation of skills needs then becomes necessary. For example, the ILO (2019 p.18) observed that the TVET system in Zimbabwe is highly fragmented with no sector-wide plan to coordinate the interventions of multiple ministries and private institutions.

This study further observed that:

- i. *“The National Manpower Advisory Council (NAMACO), which was established by the Manpower Planning and Development Act, advises the Ministry of Higher and Tertiary Education, Innovation Science and Technology Development on skills issues.*
- ii. *While NAMACO's role is of the highest importance to ensure stakeholder involvement in TVET Policy, the structure and functioning of the body are negatively affecting its effectiveness and credibility, and do not contribute to overcoming the system's fragmentation. Frequently cited problems include resource constraints that prevent the council from conducting studies and consultations, long delays in nominating members, and a lack of dialogue between the council members and stakeholders (Matanga, 2018; UNESCO, 2019)”.*

In addition, NAMACO's sectoral committees are not conducting stakeholder consultations on skills needs and skills anticipation in order to provide evidence-based advice on skills development as per their mandate. NAMACO needs to conduct inclusive outreach programmes to create awareness of its functions and broaden its reach as well as revamping its sectoral committees to take into consideration emerging sub-sectors skills requirements. These observations remain pertinent in discussions on the need for institutional coordination of functions in relation to anticipation of skills; social dialogue and mobilization of resources to conduct studies and stakeholder consultations on skills needs anticipation.

Revamping the work of NAMCO with regards to skills needs assessments and anticipation will contributed to meeting the requirements of the ZNQF, 2018. The ZNQF notes that to maintain sustained growth and development in both quality and quantity of the education system, there is a need to ensure that the system is well structured to meet the demands of both learners as well as industry and commerce. If this is accomplished then skills mismatches will be avoided. One challenge is that noble policy intentions sometimes fall short at the implementation stage thus creating a divergence between policy and practice. The proposed action plan on strengthening the LMIS and skills anticipation needs to take note of the implementation bottlenecks that can undermine good policy intentions on skills development. A challenge that needs to be resolved is the co-existence of shortages of skilled workers together with high unemployment, even among graduates from skills development institutions.

3.3. Status of Skills Mismatch in Zimbabwe

According to Palmer (2017), skills mismatch refers to a lack of matching between the skills that are available in or supplied to the labour market and the skills that are in demand in the labour market. These skills mismatches may take many forms. For example, skills mismatch occurs when individuals are either over or under qualified or skilled for a particular job which is referred to as vertical mismatch. On the other hand, skills mismatch also occurs when firms are not able to attract the right skills or where there is a genuine lack of adequately skilled people which is also called skill gaps, skill shortages, or horizontal mismatch. In some cases, skills mismatch arises when the skills that individuals possess become obsolete, also known as skill obsolescence (Mahmut and Suna, 2020).

In 2018 the Government of Zimbabwe, through the MHEISTD, produced a NCSAR. The NCSAR aimed at establishing the current skills, skill gaps, redundancies, skill surpluses, future skills and emerging skills required for Zimbabwe's industrialization and modernization. More so, it was meant to ascertain the causes of the skills shortages across all sectors. In addition, it was meant to establish a skills database which will assist stakeholders to determine skills availability for major investment projects. The report revealed that Zimbabwe has a skills shortage of about 37%, with wider shortages in engineering and technology (93.5%), and natural and applied sciences (96.95%). More so, there is a skills deficit of 88% in agriculture, 95% deficit in medical and health sciences, and an 18% deficit in applied arts and humanities. Business and commerce had a skills surplus of 121%. The Ministry reconfigured the country's education curriculum to Education 5.0 from 3.0 adding innovation and industrialization pillars to the traditional pillars of teaching, learning and community development.

The findings of the EIASZ Strategic Plan (2022–2026, p.33) corroborates the findings of the NCSAR as it showed that the engineering, iron and steel sector was a heavy consumer of artisans and technicians (71%) compared to engineers (29%). Most firms (50%) employed up to a total of five engineers, artisans and technicians (combined). About 23% of firms employed over 20 engineers and technicians combined, whilst 15% employed over 50 engineers and technicians combined. Indicatively, the sector employed on average about 20 engineers and technicians (combined) per firm (six engineers and 14 technicians). Annexure 3 shows the major skills identified by the EIASZ required in the engineering, iron and steel sub-sector.

The country's vision to industrialize and modernize the economy by 2030 (Vision 2030) is built on the availability of sufficient engineering and technology skills. Immediate attention is required to address the skills gaps that inhibit the country from modernize the economy. The engineering and technology skills needed in Zimbabwe are in civil engineering, mining engineering, chemical engineering, industrial and manufacturing engineering, electric and electronic engineering, mechanical engineering and fuels, and energy and renewable engineering. The Zimbabwe Chamber of Mines' 2015 State of Mining Industry Survey Report also cited a lack of technical skills in the mining sector which has hindered maximum productivity in the industry.

Natural sciences, which also have high skills deficits are critical in our understanding of biodiversity, population genetics and the environmental impacts of climate change, pesticide use and so on. For Zimbabwe to harness the power of natural and applied sciences for economic development, it requires skills in biological sciences, physical sciences, biochemistry, physics, mathematics, and natural sciences. The National Skills Audit showed that there is also a high skills mismatch in all divisions of the natural and applied sciences. Increasing skills in natural and applied sciences in the country calls for increased enrolment in natural and applied sciences with a specific bias towards physical sciences, biological and related sciences, biochemistry, and earth sciences.

The business and commerce sector is the only cluster with a skills surplus of 121%. To attain global competitiveness, Zimbabwe's business and commerce sector needs to strategically pursue critical skills that are in tandem with the country's Vision 2030. To have a thriving business sector, Zimbabwe requires adequate and high-quality skills in areas such as marketing and advertising, business and administration, accounting and taxation, management and administration, transport services and logistics, banking, and insurance. Even though there is a surplus in the business and commerce sector, there is a need to narrow the skills gap in marketing and advertising (-61%), accounting and taxation (-10%), and in business administration not elsewhere classified (-84%). This can be achieved through redirecting resources from sectors with a surplus to deficient sectors. Big data analytics, machine learning and predictive financial analytics are regarded as critical skills to improve the business and commerce sector in Zimbabwe. With the changing technological requirements there is a need to focus on improvements in technology education.

Despite being the sector that employs the bulk of the labour force (68%) in Zimbabwe, the agricultural sector still has a skills deficit of about 88%. The country seeks to be self-sufficient in food production and achieving this status requires improvement in the labour force skills required in the sector. Of the 68% employed in the agricultural sector, very few of them are formally skilled for the work they are doing, which has adverse implications on their productivity. In addition to challenges regarding access to, and availability of, inputs and poor agronomic practices, skills levels are also a key determinant of agricultural productivity. Skills improvement in the agriculture sector is required in crop and livestock production, fisheries, veterinary science, and forestry.

For Zimbabwe to improve the quality and quantity of skills in the agricultural sector, there is a need to constantly review and develop curricula in tandem with ever-changing technological developments as well as taking cognisance of market trends and policy priorities for the sector. The NCSAR (2018) recommended that there should be an increase in specialist agricultural colleges to concentrate on teaching and learning in order to maximize farm production of major foreign currency earners. For example, enhancing skills driven productivity in the agriculture sector has the potential to boost agricultural production and food security; agricultural exports as well as throughout manufacturing

firms. The NCSAR observed that investment in infrastructure development for future skills in agriculture including nanotechnology, agricultural biotechnology, digital precision farming, GIS remote sensing for disease, pest, crop, and animal nutrient management is expected to address the skills gap in the sector.

The quality of medical and health sector skills plays a pivotal role in the performance of a nation's healthcare system. The functionality and growth of the healthcare sector is highly dependent on the availability and quality of the medical and health workforce. Hence, focused national efforts are required to build a world class public healthcare workforce system through the provision of critical skills as the country is experiencing a skills deficit of 95% in the medical sector. Zimbabwe needs specialized medical human resources to deliver essential health services and interventions using modern methods within the medical field that conform to international best practice. Improving the Zimbabwean medical sector also calls for the expansion of medical schools, capacitation of existing medical and health training institutions; and the expansion of medical and health sciences to other institutions of higher learning to increase output. There is a further need to expand international medical and health skills exchange programmes to build local critical masses.

The applied arts and humanities sector requires leverage on the multi-dimensional creativity of individuals (artistic creativity, entrepreneurship, and technological innovation) to create new economic value for the country. However, the sector has a skills gap of 18% (NCSAR, 2018). The existence of three Law schools in Zimbabwe has not significantly contributed to alleviate the critical skills deficits in this sector. Reducing the skills gap in the arts and humanities sector requires capacitation and expansion of the sector through the automation of the Creative Arts Sector. There is a need for focused prioritized training of creative arts specialists in countries that have the best automated creative arts training facilities while the nation builds its own capacities. Institutions should establish world-class creative arts tourism exhibition parks that promote cutting-edge creative arts, artefacts, and services at affordable costs. The Zimbabwean applied arts and humanities cluster has the innovative capacity to produce new Zimbabwe branded products and services capable of adding internationally recognized aesthetic value through the exploitation of indigenous knowledge in visual and performing arts and cultural artefacts. There is a need to develop skills as well as innovative capacity for enhanced entrepreneurial and commercial skills to artists and other service providers in the applied arts and humanities cluster to enable artists, creators and other service providers in the cluster to add value to their products.

To address the skills shortages, the NCSAR (2018) recommended a holistic approach to improving infrastructure and equipment in the teaching and learning of mathematics and science subjects at all levels as a way of enhancing the retention of experts in specialized areas within the skills development matrix. The MHTEISTD engaged the ZIMCHE to review and align all the education programmes offered by higher and tertiary education institutions with the findings of the skills audit report. The ZIMCHE came up with minimum bodies of knowledge for each programme. This exercise standardized and harmonized all the programmes offered across tertiary education institutions, increasing uniformity by 80%. Furthermore, the MHTEISTD is in the process of developing a TVET Policy to ensure quality TVET provision throughout the country to meet community, local, regional and international skills demands. TVET should take into consideration the socio-economic development objectives of the country. In Zimbabwe, the TVET Policy should contribute to the achievement of Vision 2030 and NDS1.



► **Governance of Labour
Market Information and Skill
Anticipation Processes**

► 4. Governance of Labour Market Information and Skill Anticipation Processes

4.1. Legal and Regulatory Framework for Labour Market Information and Skills Anticipation and Gaps

There are several international instruments that govern Zimbabwe's labour market and skills anticipation. These include the United Nations Sustainable Development Goal 4 whose target 4.4 is that by 2030, countries must have substantially increased the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship. The other is the Continental Education Strategy for Africa 2016–2025 (CESA 16–25), one of whose strategic objectives is to expand TVET opportunities at both secondary and tertiary levels and strengthen linkages between the world of work and education and training systems. In addition, CESA 16–25 advocates for improvement in the management of the education system and enhanced capacity for data collection, management, analysis, communication, and use. Another instrument is the SADC Strategic Framework and Implementation Plan for the Development of TVET in SADC 2018–2027. Some of the Plan's strategic areas that are outlined in the Government of Zimbabwe's TVET Policy Review: Zimbabwe (2018a) include:

- i. monitor and evaluate TVET and research capacity within the region;
- ii. align the education system with TVET systems;
- iii. staff development and institutional development at the Member State level;
- iv. linking TVET with the labour market; and
- v. harmonize policies and systems.

At the national level, the Manpower Planning and Development Act (Chapter 28:02) and the Census and Statistics Act (Chapter 10:29) are the pieces of legislation that seem to largely provide input for Zimbabwe's labour market and skills anticipation.

4.1.1. Manpower Planning and Development Act (Chapter 28:02)

The Act governs the development of skills in Zimbabwe and is administered by the MHEISTD. One of its objectives is to promote the development and implementation of the national skills planning and development strategy. It further provides for the operations of public education institutions as well as the financing of skills development in the country through the ZIMDEF. Additionally, it provides for the creation of the NAMACO in Section 19(1), an advisory body to the Minister. Its role is to, among others, establish and maintain manpower development and training schemes that ensure adequate supply of trained manpower in Zimbabwe; and propose measures to improve manpower development and training programmes. It also advises the Minister on techniques for detecting in advance the possible impacts on any profession or trade induced by technological developments. Further, it sets the standards for certification of skilled worker qualifications; standardizes training programmes and trade or industry examinations; and selects persons to be trained under government teachers' colleges and technical or vocational training institutions. The council is also responsible for promoting and mobilizing support for manpower development and training programmes of the government, including the organization of congresses of representatives of such institutions and agencies as the Minister may approve. NAMACO is constituted by representatives from government, labour organizations and the private sector.

One way through which this Act promotes the collection of labour information is through Section 15(1). This section requires every employer who employs former students from a Teachers' college, TVET institution, university or college in Zimbabwe to notify the Secretary within thirty days of the engagement, inclusive of the name and address of the person so engaged.

In addition, LMI is provided for through the maintenance of registers of lecturers and instructors. Section 17 of the Manpower Planning and Development Act (Chapter 28:02) requires every registered teachers' college and TVET institution to maintain and furnish the Secretary with the type of training offered. It also requires the college or institution to keep a register of lecturers or instructors at the training institution indicating their qualifications and experience.

LMI is further provided for under Section 35(1) of the Manpower Planning and Development Act. On registering as an employer, the Act requires the applicant to provide information with regards to the number of apprentices he/she is prepared to employ during the period of twelve months following the date of his/her application. The employers are required by the Act to recruit people that are registered as candidates for apprenticeships. Section 37 of the Act requires the Minister to keep a register of apprentices, employers and the contracts of apprenticeship between the apprentice and the employer.

4.1.2. Census and Statistics Act (Chapter 10:29)

This Act provides for the establishment of the National Statistics Agency and the collection and processing of statistics including those on labour issues. Section 12(1) of the Act provides for the conducting of national census every ten years. Another provision relating to labour statistics is Section 13(1) of the Act which specifies that the Agency shall, when the Minister so directs, collect statistics for Zimbabwe or any part thereof with respect to such matters as may be prescribed. Labour force surveys are now being conducted by ZIMSTAT quarterly since the 3rd quarter of 2021. The Quarterly Labour Force Survey provides key labour market indicators which include but are not limited to levels of employment for both formal and informal, unemployment and some labour underutilization indicators, income levels, labour migration and job losses. These statistics are useful in providing information for policy formulation on employment, human capital development strategies, macroeconomic development, incomes support and social programmes (ZIMSTAT, 2021).

4.2. Adequacy of TVET and Skills Anticipation Policy in Zimbabwe

Skills shortages and mismatches are costly to individuals, firms and the government. These costs can be reduced through better assessment and anticipation of changing skill needs and by improving the responsiveness of skills development to these changes¹⁸. The ILO (2015) defines skills needs anticipation as activities to assess future skills needs in the labour market in a strategic way, using consistent and systematic methods. TVET plays a very important role in producing the skilled workforce that underpins industry and propels economic growth (GoZ, 2018a).

Since 1980 the Zimbabwean Government has focused on quality skills development in order to develop a sustainable local workforce, and facilitate rewarding careers for young people. This was achieved through the expansion of the human capital base of artisans and technicians; creation of science and technology-based universities such as the National University of Science and Technology (NUST), Chinhoyi University of Technology (CUT), Harare Institute of Technology (HIT), and Bindura University of Science Education (BUSE); up-scaling science and technology in the country's other universities, polytechnics and colleges; creation of strategic research institutions such as the Scientific and Industrial Research and Development Centre, the Research Council of Zimbabwe, and the National Biotechnology Authority of Zimbabwe; and the embracing of Information and Communications Technology at all education levels (GoZ, 2018b).

18 <https://www.oecd.org/publications/getting-skills-right-assessing-and-anticipating-changing-skill-needs-9789264252073-en.htm>

The Government of Zimbabwe undertook the Nziramasanga Presidential Commission of Enquiry into Education and Training (1999) which necessitated the creation of a new Primary and Secondary Education Curriculum commissioned in 2016, Competency Based Education and Training curriculum review for TVET commissioned in 2012 and a curriculum review exercise for teacher education was completed in 2015. Frequent national skills audits will identify emerging skills gaps and inform the development of strategies and interventions to address critical skills shortages and mismatches.

Under the NDS1, the Government of Zimbabwe aims to increase critical skilled experts from 38% in 2020 to 51% by 2025. This is envisaged through reconfiguring the education system from Education 3.0 which includes just teaching, research and community service, which produces only literate job seeking graduates, to Education 5.0 which includes innovation and industrialization, which produces entrepreneurs, quality goods and services (GoZ-NDS1, 2020). The government has already begun reviewing degrees offered by State Universities with the intention of standardizing qualifications and abolishing 'irrelevant' programmes that are ostensibly creating 'idle' graduates who do not have innovative skills. An increased supply of a specialized work force is expected to be produced through the implementation of new education programmes supported by modern infrastructure and responsive curricula tailored to meet industry needs.

Plans are underway to improve access to and utilization of advanced knowledge and technologies under NDS1. The Government of Zimbabwe has committed to standardizing and harmonizing basic education, tertiary and higher education through the Zimbabwe National Qualifications Framework and complementary programme infrastructure frameworks; and promoting critical specialist skills through policy and legislation (GoZ-NDS1, 2020, p.153). As part of the skills anticipation policy, Section 47 of the Manpower Planning and Development Act provides for financing of the manpower development in the country through the ZIMDEF. The objectives of the Fund are to develop skilled manpower and professions; and to support and promote the creation of new knowledge; research; innovation; science; technological and engineering solutions; and business enterprises. The Fund is administered by a Chief Executive Officer in accordance with the Minister's directions, given on the advice of the Council.

4.3. Gaps and Challenges

- ▶ **No comprehensive TVET Policy.** There is currently no national policy or strategy that addresses all types of TVET or skills development programmes provided in Zimbabwe. The current TVET programmes are mainly concentrated in the urban areas and tend to discriminate against learners situated in remote areas. More so, they do not fully accommodate people with disabilities or those that are economically or intellectually disadvantaged. There is an ongoing consultative process that will lead to the development of the TVET Policy.
- ▶ **Lack of TVET programmes coordination.** TVET programmes are provided and administered by several Ministries, Departments and Agencies; private and Non-Governmental Organisations training providers, with little coherence and no clear coordination structure across these programmes in terms of governance, quality standards and assurance mechanisms. For example, not all programmes offered by different Ministries meet the accreditation standards of the Higher Education Examinations Council.
- ▶ **Lack of skills recognition.** Particularly of workers with tacit skills in the informal sector.
- ▶ **Limited funding.** While TVET programmes in Zimbabwe are funded through government subsidies, student fees and the ZIMDEF training levy, no government subsidies or budgetary allocations have been received from the public purse since 2012 (GoZ, 2018a). Furthermore, ZIMDEF's mandate does not extend to the vocational training centres that target economically and academically vulnerable groups of learners (GoZ, 2018a). It only funds TVET programmes of institutions that fall under MHEISTD or those accredited by it including programmes offered by NGOs (GoZ, 2018a). ZIMDEF misses out on providing support to strategically important skills development programmes for the Zimbabwean economy (GoZ, 201833). This implies that the current funding model is not inclusive and leaves out some deserving trainees.

- ▶ **Limited mechanisms** to steer TVET systems in Zimbabwe to quickly respond to the country's skills needs. There is also limited participation of development partners in the TVET sector.
- ▶ **Limited frequency of skills anticipation initiatives.** The 2018 Critical Skills Audit assisted in providing a focused programmatic approach to identifying skills, gaps, redundancies, shortages and emerging technological trends and recommended the critical skills required to refocus training, research and skills development planning. The major challenge, however, is that some of the findings and recommendations may have been overtaken by events given the dynamic changes in the technological world and the changes in the world of work induced by Covid-19, which created new demands for skills which were not present in 2018.
- ▶ **Data currently generated is neither robust nor readily available.** Whilst the government acknowledges that the process of developing the required human capital should be informed by existing and forecasted critical skills that drive key economic sectors (GoZ, 2018b), the absence of an integrated functional LMIS makes it difficult to forecast the critical skills required. The current fragmented system of capturing and storing LMI presents challenges in anticipating future skills requirements and tends to provide policy makers with inadequate critical information for policy formulation and planning.
- ▶ **Skills anticipation scope not covered.** Sectoral policies complementary to the TVET Policy such as the employment policy, labour migration policy and the National Industrial Policy do not adequately cover issues related to skills anticipation.
- ▶ **Implementation of recommendations takes time.** For example, the Commission of Enquiry was done in 1999 and implementation of its recommendations began 17 years later. Skills requirements are time sensitive and delays in implementation result in the recommendations being overtaken by events and worsens the skill gap. This further delays the skills development institutions' response to the requirements of industry, leading to skills mismatch.





► **LMI and Skills Anticipation
Institutional Framework and
Coordination Arrangement**

► 5. LMI and Skills Anticipation Institutional Framework and Coordination Arrangement

The 2009 National Employment Policy Framework put in place a basic Labour Market Institutional framework structure in which reporting requirements and interactions between key stakeholders were introduced. Through this framework, the Government fully recognizes that productive employment and decent work, especially for youths, cannot be achieved through fragmented and isolated interventions. On the contrary, this requires sustained, determined, and concerted efforts by all stakeholders, including those most affected, mainly youths, women and people with disabilities. The importance of coherence, coordination and cooperation across government institutions and agencies as well as civil society at both central and local levels, cannot be over emphasised. This requires a paradigm shift with regards to the integration of employment in all policy frameworks, including macroeconomic and sectoral policies.

Institutional frameworks that facilitate skills needs assessment and anticipation need to be coherent and well-coordinated. Currently the coordination among labour market actors producing LMI is poor and not fully institutionalised. Challenges remain with regards to effective involvement of social partners including trade unions and sectoral employer organizations and the absence of a data sharing policy and supportive legislative framework. This may require anonymization of data obtained from institutions like ZIMSTAT and ZIMRA which are bound by legal provisions of non-disclosure of the identities of the data providers.

The ZIMCHE which is responsible for the accreditation of higher education institutions and programmes plays a key role in skills anticipation. Skills needs assessment should be a key requirement of the programme accreditation process. Skill needs are assessed using detailed surveys, peer review panels and combined methods. Furthermore, Liaison Committees established by some university departments engage with captains of industry on skills developments to inform their curriculum development. The major focus of these committees is on the qualitative level, i.e. negotiating proposals for new or changed skills needs and this will be appraised, and accredited by ZIMCHE. Table 4 summarises key labour market actors and their responsibilities, in the provision of LMI and data for skills anticipation.

Table 3: Key actors in the labour market and their responsibilities

Actor	Sector/Ministry/Agency	Responsibilities
Ministry of Public Service, Labour and Social Welfare (MPSLSW)	Ministry	► Central coordination of labour market and skills anticipation ► Provides annual reports on labour market needs
Ministry of Higher and Tertiary Education, Innovation, Science and Technology Development (MHTEISTD)	Ministry	► Provides policy guidance on skills development through higher education and TVET systems ► Oversees NAMACO which advises on skills needs to inform curriculum development ► Provides data on skills developed through the higher education and TVET systems

Actor	Sector/Ministry/Agency	Responsibilities
All other line ministries	Ministry	▶ Line ministries are essential institutions of the labour market and skills anticipation governance network ▶ Each Ministry has its own indicators to monitor employment and training needs in their sectors
Zimbabwe National Statistic Agency (ZIMSTAT)	State Agency	▶ Collects official labour statistics that feed MPSLSW reports
National Social Security Authority (NSSA)	Parastatal under the MoLPSSW	▶ Manages the State social security ▶ Provides official statistics that feed MPSLSW reports
International Labour Organization (ILO)	United Nations Agency	▶ Promotes rights at work, encourages decent employment opportunities, enhances social protection and strengthens dialogue on work-related issues
Labour and Economic Development Research Institute of Zimbabwe (LEDRIZ)	Civil Society	▶ Develop research, to influence development processes and outcomes in employment creation, social protection and social dialogue
Zimbabwe Council of Higher Education (ZIMCHE)	State Agency	▶ Provides criteria for the accreditation of higher education institutions and programmes ▶ Constitute peer review panels to attend to the accreditation applied for by an institution
Zimbabwe Manpower Development Fund (ZIMDEF)	Education	▶ Finances the training of apprentices in Zimbabwe ▶ Funds the procurement of training equipment and consumables for TVET institutions and institutions of higher learning
Public Service Commission, Parastatals, Employer Associations; Labour Unions, National Employment Councils; Industrial Associations and Business Membership Organization	Various	▶ Provide data on employment within their respective sectors
Private Employment Agencies	Private Sector	▶ Compile data on job opportunities and skills required/deployed

5.1. Social Dialogue Mechanisms

Social dialogue is defined by the ILO to include all types of negotiation, consultation or simply exchange of information between, or among, representatives of governments, employers and workers, on issues of common interest relating to economic and social policy¹⁹. One of the major objectives of social dialogue is to promote consensus building and democratic involvement among the key stakeholders. Social dialogue is critical as it encourages good governance, and has the potential to resolve socio-economic teething issues thereby fostering the growth of the economy. It creates a conducive environment for decent work in both formal and informal sectors. Social dialogue is the cornerstone of skills needs anticipation²⁰. It allows employers and workers to anticipate job losses and, together with governments, take active measures to prepare displaced workers for labour market transitions²¹. The ILO promotes the establishment of institutional arrangements that promote the matching of skills demand and supply through systematic dialogue.

There are preconditions for effective social dialogue and these include independent and representative employers and worker organizations with the technical capacity to engage in social dialogue; political will; trust and commitment by all parties to engage; access to adequate information and training of partners for them to effectively engage. The other precondition is the need to respect the right to freedom of association and the right to collective bargaining. In addition, an enabling environment is also imperative for fruitful social dialogue.

Legislative frameworks that have provisions for social dialogue on matters relating to LMI and skills anticipation do exist. For example, Section 19(1) of the Manpower Planning and Development Act (Chapter 28:02) provides for the creation of NAMACO, an advisory body whose role, among others, is to propose measures to improve manpower development and training programmes. It also advises the Minister of MHEISTD on techniques for the advanced detection of possible impacts on any profession or trade of technological developments. In addition, Section 3(3)(f) of the Tripartite Negotiating Forum (TNF) Act, 2019 outlines one of the roles of the TNF as that of consulting and negotiating Zimbabwe's labour laws in line with the Constitution and other international best practice. The TNF was established in line with ILO Convention No. 144 on Tripartite Consultation of 1976 as ratified by the Government of Zimbabwe in 1989.

The legislated TNF comes as a welcome development as the ad hoc, informal and unlegislated nature of social dialogue in Zimbabwe since 1998 suffered setbacks as limited political will and zeal to work together with social partners proved to be inadequate in facilitating productive engagement. In some cases, social partners have expressed concern that government did not adequately consult with them and take into consideration their inputs prior to the adoption of key policies. Further, political polarization and interference, and a lack of trust and negotiating in good faith among social partners continues to militate effective social dialogue. The legislated social dialogue mechanism provides an opportunity for social partners to embrace discussions on broad socio-economic issues including skills needs assessments and skills anticipation. Another platform that facilitates social dialogue is the NECF which is tripartite in nature. Social partners engage on this platform to discuss a wide range of policy issues through the different sectorial taskforces. However, both the TNF and NECF have not had any dialogues on skills needs assessments and skills anticipation, which is a glaring gap that needs to be closed. The SIFA NTT can create awareness of the need for social dialogue on skills needs assessment and anticipation in its own capacity or in collaboration with the TNF or NECF Secretariats.

The crafting of the National Productivity Institute Bill and the Occupational and Health Safety Bill will also aid dialogue on skills anticipation. The National Productivity Institute for example, is expected to provide a platform through which skills development and anticipation can be fostered. Although it was initially

19 https://www.ilo.org/actemp/areas-of-work/WCMS_731146/lang--en/index.htm

20 https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---ifp_skills/documents/publication/wcms_534307.pdf

21 <https://www.theglobaldeal.com/resources/Thematic-Brief-Social-Dialogue-and-the-FoW.pdf>

muted in 1998, it was relaunched in 2003 with a mandate to create competitive workplace environments that increase employment; develop skills to deliver quality outputs; maximise the exploitation of the country's resources and fair distribution of the fruits of productivity. While the Secretariat of the National Productivity Institute has been undertaking some awareness campaigns on productivity issues the TNF parties want it to be more active and visible. The NDS1. (p.30) acknowledged that productivity is key in driving sectoral growth and the need for the Zimbabwe National Productivity Institute to spearhead the promotion of productivity consciousness in all sectors of the economy.

The Labour Act (Chapter 28:01) provides for social dialogue at bipartite level as well as at the sectoral level where there are collective bargaining agreements. At enterprise level, work councils are very functional and where they are not functional, the MPSLSW is mandated to enforce their establishment. At the sector level, there are very vibrant employment councils where employers and workers engage together in coming up with collective bargaining agreements which the MPSLSW then gazettes. One key observation is that while legislative frameworks that have provisions for social dialogue are in place there have been no dedicated national social dialogues organised on skills needs assessment and anticipation by the different dialogue conveners.



► Conclusion and Recommendations

► 6. Conclusion

One key issue noted in this mapping exercise is that the country does not have a robust institutionalized process for anticipating labour market skills needs which is informed by rigorous analysis and social dialogue among a broad spectrum of stakeholders. These processes should be strengthened and built upon to entrench skills needs anticipation. The work being done under the SIFA Project can go a long way in raising the profile of skills needs assessments and skills anticipation in the country. This will entail paying closer attention to institutions with mandates to: undertake skills needs assessment and anticipation surveys; collect LMI including skills mismatches; analyse LMI and provide advice on skills development and capacities for these institutions to execute their mandates. Skills development institutions should base their training curriculum on evidence generated from the analysis of available LMI. Skills needs assessments and anticipation should be institutionalized as a key component of the LMIS.

It has been observed that skills development systems in Zimbabwe, like in most African countries, typically consists of public and private providers and are highly fragmented and need to be coordinated. Questions have been raised with regards to the quality of skills development programmes and their orientation to demand, particularly the extent to which skills developed meet labour market requirements. Accessibility of skills development institutions to enhance employability of disadvantaged populations; lack of standards among skills development providers; comparability and quality assurance of programmes and certificates have been raised as factors contributing to the widening gap between the skills offered and those needed in labour markets.

The education and learning systems need to become more versatile to be able to achieve the scale and speed needed in the new world of work. For example, the Fourth Industrial Revolution, is characterized by swift and unexpected change across economies and labour markets, thus requiring a new shared vision on skills development to ensure current and future social mobility. This entails closer collaboration between individuals, educationalists, education innovators, policy-makers, and businesses in identifying the new skills required in the world of work to facilitate the scaling up of reskilling and upskilling efforts.

Institutionalization of skills needs assessments and anticipation as key components of the LMIS should be based on the recognition that skills have become the core currency of the labour markets. Having appropriate skills has the potential for wide-ranging positive consequences in matching available skills with job opportunities; increasing income earning capacities of workers and the reduction of skills mismatch induced costs. The processes of gathering, analysing and disseminating LMIS requires an appropriate institutional setting with clearly defined roles and responsibilities as well as adequate resourcing of the respective institutions to implement their mandates. Active involvement and collaboration of various stakeholders including social partners are a requirement for establishing an efficient and well-functioning LMIS with skills anticipation as an integral component.

► 7. Recommendations

7.1 Institutions (Social Dialogue, Coordination and Policy)

1. Foster social dialogue on the institutionalization of the assessment of skills needs and skills anticipation which involves different social partners in order to entrench ownership of LMIS. MPSLSW (skills demand side) in collaboration with the MHEISTD (skills supply side) should facilitate the dialogue in line with the agreed action plan. Inclusive dialogue is a precondition for establishing an efficient and well-functioning LMIS and ensures that no one is left behind. A robust LMIS will further inform dialogue under the TNF.
2. The TVET Policy should:
 - i. Promote the undertaking of regular skills needs assessment and anticipation exercises;
 - ii. Articulate strategies to address fragmentation of the TVET system;
 - iii. Design sustainable and inclusive TVET funding models. This may include exploring ways to move away from over reliance on tuition fees as the primary source of funding for operations of TVET institutions through blending of funding designated for skills development from government, development partners and the private sector to support skills development and skills anticipation in the country;
 - iv. Cater for skills recognition and a certification system for workers with tacit skills in the informal sector;
 - v. Promote inclusivity of learners from remote areas, people living with disabilities and economically disadvantaged learners and communities;
 - vi. Articulate strategies for skills retention, skills value propositions and development of skills sector strategies; and
 - vii. Include Training for Enterprise programmes offered by the Ministry of Youth, Sport, Arts and Recreation, Ministry of Women Affairs, Community, Small Enterprises and NGOs and the Skills for the Production of Goods and Services offered by MHEISTD in the skills anticipation strategies.
3. The ZIMCHE should constantly review and develop curricula in tandem with ever changing technological developments while being cognisant of market trends and policy priorities for different sectors.
4. MHEISTD needs to ensure that the higher education and TVET systems are well structured in order to meet the demands of both learners and industry and commerce. This entails ensuring that the education and learning systems become more versatile to be able to achieve the scale and speed needed to respond to dynamic changes in the world of work.
5. Develop a policy that facilitates data sharing to enable all users to access data on the LMIS.
6. Design an implementation plan for the development of a LMIS and skills anticipation system with an effective monitoring and evaluation strategy and communication strategy for the National Action Plan to facilitate broader stakeholder awareness and buy-in.
7. NAMACO needs to effectively undertake stakeholder consultations on skills needs and anticipation through its sectoral committees to provide evidence-based advice on skills development.
8. Establish a central repository of LMI managed by MPSLSW which links the diverse institutions generating LMI.
9. Enhance awareness and promotion of the ZNQF as the custodian of all qualifications offered in Zimbabwe.
10. Review the employment policy, labour migration policy and the Zimbabwe National Industrial Policy in order to cover skills anticipation matters.

7.2 Analytical Capacity

1. There is a need to build forecasting skills capacity as this will inform economic development programmes and plans. This requires the efforts of the MPSLSW, MHTEISTD, industry; labour, private employment agencies, research institutions and development partners among others.
2. Government needs to request the ILO and the ARLAC for technical assistance to run in-country courses for labour market actors to build their analytical capacity to undertake skills needs assessment and anticipation.
3. Build capacity to undertake studies to map the skills requirements for workers in the informal economy to inform the implementation of the formalization strategy.
4. MPSLSW to devise instruments to monitor skill movements and inflows to inform skills needs assessment and anticipation through the migration centres.

7.3 Methods and Tools

1. MPSLSW to develop standardized templates for harvesting administrative data.
2. Creation of a portal to enable users to input and access the LMI.
3. Use artificial intelligence and big data analytics for data mining to inform skills needs assessment and anticipation.
4. Creation of an integrated LMIS in accessible formats by all user of LMIS.
5. MPSLSW to spearhead the standardization of concepts and definitions with International Standard Industrial Classification and Industrial Standard Classification of Occupation to facilitate data collection.

7.4 Data (Production and Use)

- ▶ All national and industry surveys must include modules and questions on skills anticipation.
- ▶ MPSLSW must ensure that the data collected by the various sources is captured in line with International Standards and that it is regularly updated.
- ▶ Provision of adequate funding for the production and collation of LMI from different producers of LMI.
- ▶ MPSLSW to put in place mechanisms to enhance the exchange of information and coordination of different actors and institutions that produce, utilize and analyse data. These mechanisms should foster accessibility of LMI by diverse population groups including people with disabilities.
- ▶ MPSLSW should ensure the dissemination of LMI and data in formats that meet the requirements of diverse needs of labour market participants.

7.5 Other Recommendations

- ▶ MHTEISTD should enhance the quality assurance system especially for the TVET system. This will further enhance the demand for skills and the attraction of financial resources to support underfunded TVET institutions.
- ▶ There is a need to review institutions that have skills needs assessments and anticipation within their mandates to ensure that they are revamped and adequately resourced to be able to feed into the LMIS.
- ▶ SIFA NTT to oversee the implementation of the proposed National Action Plan and the convening of social dialogues on skills needs assessment and anticipation in its own right or in partnership with other national dialogue conveners such as the TNF and NECF Secretariats.

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► 9. Annexures

Annex 1: Key Challenges Identified in the ILO State of Skills Study

- i. **Fragmentation of the TVET system.** The TVET system in Zimbabwe is highly fragmented, and there are no functioning coordination mechanisms between the different ministries involved in skills provision and certification. This makes the adoption and implementation of reforms a time consuming and complicated endeavour.
- ii. **Weak involvement of industry and social partners.** Social dialogue and industry involvement in TVET are still limited, both at the level of policy-making and in training delivery. Zimbabwe already supports workplace learning through modernized apprenticeships and the industry attachment of TVET students. The benefit of such measures should be extended by increasing social dialogue and the participation of enterprises in TVET.
- iii. **Lack of sustainable financing for TVET institutions.** TVET institutions, both public and private, rely heavily on tuition fees for financing training materials and workshop equipment, as well as for compensating the lack of subsidies for the payment of teachers and the modernization of infrastructure. This represents a major challenge to making the system equitable and accessible to young people from poor families. At the same time, it has a negative effect on the quality of training. Government subsidies and ZIMDEF are not used to steer skills provision according to principles such as social inclusion and responsiveness to the needs of the economy.
- iv. **Lack of relevance of skills provision.** There is no system for skills needs identification and curriculum review. There is also little information on the labour market outcomes of existing programmes. This affects the quality and relevance of skills provision, and also reinforces the negative perception of TVET by young people and employers.
- v. **Poor quality of skills provision and scant appeal of TVET.** Underfinancing of TVET institutions, and a still rudimentary quality assurance system, have resulted in overall poor quality of training. This, in turn, fuels the negative image of TVET in society. Nevertheless, some formal apprenticeships and programmes offered at post-secondary level by better resourced institutions demonstrate that good quality can make TVET attractive to both young people and employers.
- vi. **Access, equity and progression.** There are numerous barriers for vulnerable groups in the current TVET system. Rigid entry requirements, lack of clear pathways for progression, and the absence of effective guidance mean that large shares of the population cannot benefit from training to improve their employability and productivity or enhance their chances of better livelihoods and working conditions.

Annex 2: Way forward suggested in the ILO (2019) State of Skills Study

- i. **Supporting the development and adoption of a new TVET Policy.** A new TVET Policy that addresses all facets of the skills systems, and defines strategic priorities for investments, could help Zimbabwe to realize its vision of becoming a middle-income country by 2030. For instance, employment potential analysis and other studies conducted with support from the ILO can provide much needed evidence for the policy-making process.
- ii. **Investing in the TVET system and improving the effective allocation of available funds.** Based on a strategic vision of the TVET sector, and taking into account national development priorities, there is a need to design innovative approaches for financing skills delivery, both in public and private institutions. In particular, financing mechanisms should support the shift from a supply-led to a demand-oriented skills system.
- iii. **Strengthening social dialogue and industry involvement at policy level and in TVET provision.** The progress made in strengthening social dialogue at national level through institutionalization of the Tripartite Negotiation Forum (TNF) should be continued, and extended to TVET governance and delivery, for example for management of ZIMDEF. Workers' and employers' organizations could benefit from international support to strengthen their capacities to contribute their expertise at all levels of the TVET system. Stakeholder involvement also needs to be strengthened at institution level to make training more relevant to the needs of the labour market and learners.
- iv. **Supporting implementation of the national qualification framework.** The government achieved a milestone in launching the ZNQF in 2018. The implementation phase is challenging, as shown by other countries' experiences. Zimbabwe could therefore benefit from the expertise and lessons learned in other countries.
- v. **Supporting the development of an integrated and localized system of skills anticipation.** While the establishment of a fully-fledged LMIS cannot be achieved in the short term, information about the careers of graduates and feedback from employers can be gathered at a relatively low cost. This can be used to assess the relevance of training programmes and inform curriculum revision. Existing toolkits and methodologies developed by international organizations such as the ILO, the European Training Foundation, or the European Centre for the Development of Vocational Training, could be used to support the progressive development of skills anticipation and monitoring capacities at institutional level, as well as at provincial and national level.
- vi. **Developing skills provision for workers in the informal economy.** The skills system has a role to play in supporting the transition of informal sector enterprises to the formal sector. To increase their productivity and improve their working conditions, workers in the informal economy need to have access to business and vocational skills, as well as to education on socio-economic rights. Targeted programmes should take into account the living conditions of specific groups such as women, people with disabilities, or youths. Following the example of the ILO Green enterPRIZE Innovation & Development Project in Zimbabwe, it is important to prioritize actions in strategic sectors aimed at supporting sustainable and inclusive economic growth (ILO, 2017).

Annex 3: Major Skills Required in the Engineering, Iron and Steel Sector of Zimbabwe

Subsectors	Technicians/Artisans	Engineers	Others
Primary iron and steel production	Metallurgist, electricians, mechanical artisans, welders, boiler makers, instruments technicians, brick layers and builders, pattern makers, riggers, draftspersons, laboratory, chemical and process.	Metallurgist, chemical and process, mechanical and mechatronics, civil and water, electrical, electronics, environmental, energy.	Occupational Health and Safety technicians and health professionals, lawyers, finance and accounting, business and marketing, investment experts.
Foundry and engineering	Metallurgist, electricians, mechanical artisans, welders, moulders, pattern makers, draftspersons, laboratory, chemical and process.	Metallurgist, chemical and process, mechanical and mechatronics, electrical, environmental.	Occupational Health and Safety technicians and health professionals, instruments technicians, energy, civil, finance, business and marketing.
Fabricated metal products and structural	Electricians, mechanical artisans, welders, boiler makers, instruments technicians, riggers, draftspersons.	Mechanical and mechatronics, civil, structural, architectural, electrical, electronics, environmental, energy.	Metallurgist, Occupational Health and Safety technicians and health professionals, electrical, electronics, environmental, finance, business and marketing.
Assembled goods	Metallurgist, electricians, mechanical artisans, welders, boiler makers, instruments technicians, draftspersons.	Mechanical and mechatronics, electrical, electronics, environmental, energy.	Occupational Health and Safety technicians and health professionals, environmental, civil and water, process, metallurgist, laboratory, finance, business and marketing, legal.
Electrical engineered goods and electronics	Metallurgist, electricians, mechanical artisans, welders, instruments technicians, moulders, pattern makers, riggers, draftspersons.	Electrical, electronics, metallurgist, mechatronics.	Mechanical, Occupational Health and Safety technicians and health professionals, environmental, energy, civil, chemical and process, finance, business and marketing.
Engineering services and consultancy	Metallurgist, electricians, mechanical artisans, welders, boiler makers, instruments technicians, brick layers and builders, pattern makers, riggers.	Metallurgist, chemical and process, mechanical and mechatronics, civil and water, electrical, electronics, environmental, energy, architectural, automation.	Occupational Health and Safety technicians and health professionals, human resources, finance, business and marketing, economists, legal.

Source: Zimbabwe Engineering, Iron and Steel Sector Strategy (2022–2026, pp.32-33).

Notes

