



Ulandssekretariatet
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Danish Trade Union
Council for International
Development Cooperation

Mozambique

Labour Market Profile

2014

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



Mozambique – Labour Market Profile 2014

Executive Summary

Mozambique is one of the poorest and least developed nations in the world. The economic growth has an impressive averaged of 9% for a decade. That growth has largely been in extractive industries and in particular the aluminium export. It is a narrow employment sector, though, and has created few jobs. In addition, much of the wealth does not reach the broader population. Despite the introduction of the reformed Labor Law in 2007, the labour market remains rigid and an impediment to business.

The formal sector is estimated to cover only 700,000 jobs while the labour force constitutes 11.6 million workers. It shows the presence of a large informal economy, which is estimated to absorb 95% of the labour force. Unfortunately small household enterprises are in general not supported by policies that improve their business environment. Around 300,000 youths join the labour force every year but the labour market do not create sufficient jobs in the formal sector. Although the government operates with development strategies, where employment is a priority, it has no specific strategy for promoting youth employment. The unemployment rate has been relatively high on an estimated 8%, and higher among youth of approximately 13%.

The traditional trade union membership base was strongly affected back in the 1987 by the large reduction in the number of salaried workers. It has slowly been rebounded. Currently, the trade union density of the labour force is 2.5%, including members from affiliated trade union from the informal economy. A new law on trade union rights for workers in the public administration was approved in April 2014. It opens possibilities of expanding the trade union membership from the public sector as well as establishes dialogue with the employers and defends the interests of members.

There are strict legal constraints on workers' meetings in workplaces and workers exercise few of these

rights. Mediation is getting more institutionalised into labour mediation and arbitration centres, which were extended to all provinces in 2012. Around 208,000 workers are covered by Collective Bargaining Agreements (CBAs) which equals 1.8% of the labour force.

The 2014/15 highest monthly minimum wage is in Financial Services as constitutes 6,817 metical (US\$228) per month, and the lowest in Agriculture as 2,500 metical (US\$84). It is calculated that the growth of real minimum wage in the period 2004-2011 has increased 32%.

Women have a slight higher employment rate than men, which is unusual for most economies. Notwithstanding, women have a limited control over household resources and female-headed households are still poorer than their male-headed counterparts.

The country's social insurance coverage is very low. Among others, social insurance coverage has been restricted to salaried workers. It is registered that merely 4% of the population is covered by health social protection and 3.8% are active contributors to a pension scheme. Few social protection mechanisms exist for the informal and self-employed workers such as small family or community run schemes. On the other hand, the Social Security Law of 2007 aims to gradually extend the compulsory social insurance system to self-employed workers, and the government makes steps in the direction of a national social protection floor.

Mozambique has the lowest average years of schooling in the world. The low skill level means that companies often import skilled labour. There is in particular demand for vocationally educated labour. A new law on professional education was approved in July 2014.

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Trade Unions

Trade unions in Mozambique (2013)	
Number of trade unions	23
Dues (per OTM-CS member)	1 metical
Members of trade unions	235,500
Trade union members share of labour force	2.5 %
Trade union members to waged workers	23 %
Female member share of trade unions (OTM-CS)	25 %
Members of affiliated trade unions from the informal economy (ASSOTSI)	60,000
Number of CBAs (OTM-CS)	1,297
Workers covered by CBAs (OTM-CS)	207,735
Share of waged workers covered by CBAs	20 %
Labour force (2012) ¹	11.8 million
<i>Note: Members of trade unions includes OTM-CS and CONSILMO; excludes members of affiliated trade unions from the informal economy.</i>	

Overall, the trade union density of the labour force is 2.5%, including members from affiliated trade union from the informal economy.

The Labour Law covers the right of workers to organize and engage in collective bargaining. Around 208,000 workers are covered by Collective Bargaining Agreements (CBA). It indicates that 20% of waged workers are covered by CBAs. From another perspective, the CBAs protect only 1.8% of the total labour force.

It is noteworthy that 60,000 workers are members of affiliated trade unions from the informal economy, and cover 20% of the country's total trade union membership rate, based on trade union federations' membership.

Labor unions have exerted pressure on the government to maintain some very pro-worker provisions in labor legislation, particularly regarding dismissal of local personnel and work force composition, although they show flexibility on other major issues. The minimum wage, decided every year, remains a major concern for the unions.²

A new law on trade union rights for workers in the public administration was approved in April 2014. It

regulates the exercise of freedom of association by this category of workers and establishes dialogue with the employers. The law had several political controversies. Among others, the government insisted that union rights in the public administration and the right to strike are separate issues which belong in two different pieces of legislation.³ The new law's articles, which include the legal recognition of the Civil Service Union (SINAFP), are in a process of formalization that takes several months.

There are over 23 trade unions in Mozambique, grouped into two main branches.

Organizaco dos Trabalhadores de Mocambique – Comite Sindical (OTM-CS)⁴

The Mozambican National Trade Union Centre (OTM-CS) was established in 1976 as a trade union federation for all Mozambican workers, albeit with a very strong link to the ruling party, FRELIMO. OTM-CS covers all provinces in Mozambique and has 14 affiliated national unions. The organization is affiliated to ITUC.

The traditional union membership base was strongly affected back in the 1987 by the large reduction in the number of salaried workers. Among others, the OTM-CS's membership trend dropped down from 200,000 workers from the formal sector in 1990 to 92,000 in 2002; and the density of the trade union federation plummeted from 68% to 40%, respectively.⁵ The membership share has been stable since 2009 and reached 129,500 in 2013. Based on estimations, the membership density of waged workers as members of trade unions increased from 14% in 2009 to 23% in 2013. It remains much lower than in the beginning of 1990s, but when the SINAFP is legally recognized it opens up for an influx of many new trade union members.

Confederacao Nacional dos Sindicatos Independentes e Livres de Mocambique (CONSILMO)

CONSILMO has four member organisations with a total of 106,000 members.⁶ CONSILMO was founded in 1992 as a breakaway union from OTM-CS, due to the ties to the FRELIMO party. It is involved in the Tripartite Working Commission at the national level.

Trade Unions in Mozambique⁷							
Members, Dues, Collective Bargaining Agreements (CBA) and Occupational Safety and Health committees							
Trade Union / Trade Union Centre	Affiliation To national trade union centre	Total Members (2013)	Female Members	Dues (share of salary)	Number of CBAs	Workers covered by CBAs	Number of OSH committees at workplaces
OTM-CS Organizaco dos Trabalhadores de Mocambique – Comite Sindical		129,500	32,066	1 MZN	1,297	207,735	-
CONSILMO Confederacao Nacional dos Sindicatos Independentes e Livres de Mocambique		106,000	-	-	-	-	-
SINPOCAF Port and Railways Workers Union	OTM-CS	2,826	254	-	-	4,938	-
SINTIQUIGRA Chemical, Graphic and Rubber Workers Union	OTM-CS	7,323	1,793	-	-	13,417	-
SINTIME Metallurgic and Energy Workers Union	OTM-CS	9,923	1,010	-	-	17,124	-
SINTIA Sugar Workers Union	OTM-CS	21,816	3,928	-	-	30,385	-
SINECOSSE Commerce and Service Workers Union	OTM-CS	11,492	4,823	-	-	23,408	-
SINTIMAP Marine and Fishing Workers Union	OTM-CS	8,236	436	-	-	13,480	-
SNEB Bank Workers Union	OTM-CS	4,776	2,492	-	-	8,452	-
SINTAC Aviation and Communication Workers Union	OTM-CS	4,116	1,348	-	-	5,475	-
SINTIC Cashew Nut Workers Union	OTM-CS	4,650	2,050	-	-	6,500	-
SINTIAB Food and Drinks Workers Union	OTM-CS	8,274	1,709	-	-	12,561	-
SINPEOC Dock Workers Union	OTM-CS	4,673	55	-	-	7,059	-
SINTAF Agriculture and Forester Workers Union	OTM-CS	36,460	9,553	-	-	60,012	-
SINTESPGM Security and Private Guard	OTM-CS			-	-		-
SINTELMO	OTM-CS	2,145	645	-	-	2,678	-
SINAFP Public Sector Workers Union	OTM-CS	24,750		-	-		-
SINED Education Sector Workers Union	(Affiliated, not legally recognised)	2000	1,970	-	-	2,246	-
ASSOTSI Association of Informal Economy Operators and Workers	OTM-CS (Associated organisation)	60,000	-	-	-	-	-
SINTRAT National Union of Road Transport Workers	CONSILMO	-	-	-	-	-	-
SINTIHOTSI National Union of Workers in the Hotel Industry, Tourism and Related Industries	CONSILMO	-	-	-	-	-	-
SINTESP National Union of Worker of Private Security Companies and Guards	CONSILMO	-	-	-	-	-	-
SINTICIM National Union of Workers of Civil Construction, Woodworkers and Miners	CONSILMO	-	-	-	-	-	-
SNJ National Union of Journalists	Non-affiliated	-	-	-	-	-	-
SNP National Union of Teachers	Non-affiliated	-	-	-	-	-	-

Employers' Organisations

Confederação das Associações Económicas de Moçambique (CTA)⁸

The Confederation of Economic Associations of Mozambique was established in 1996 as the Working Commission of Associations a few years after the end of the civil war. Seventy trade associations, chambers of commerce, federations and forums are members of CTA.

The mission of CTA is to create a business environment favourable to the development of the private sector, and a strong employers' organisation movement able to influence policies, be participatory, socially responsible, and promote economic competitiveness and quality of business.

CTA maintains a well-functioning structured dialogue with the government and publishes several studies of

sectors. However, it could be further improved to ensure that the views of the private sector as a whole are heard and duly taken into consideration. As currently organized, the public-private dialogue relies almost entirely on the CTA on the private sector side.⁹

CTA announced plans in June 2012 to set up a credit risk center to share information on customer credit.

Associação de Comércio e Indústria (ACIS)¹⁰

CTA faces a strong competitor from the Chamber of Commerce and Industry (ACIS). Unlike the CTA, ACIS is perceived to be independent of FRELIMO. Involved in a variety of corporate social responsibility programs, including HIV/AIDS programs in workplaces, ACIS seeks to represent a broader spectrum of interests as it contributes to improved relationships with workers.

Central Tripartite Structures

Mediation and Arbitration

Collective disputes are governed by the Labour Law.¹¹ A dispute must be mediated by a body chosen by the parties in the dispute, or otherwise a Labour Mediation and Arbitration Commission (LMAC). The parties can choose voluntary arbitration, whereas arbitration is compulsory in essential services, a broad definition that includes workers in the Export processing Zones. An arbitration committee is appointed, with three members, one from the parties in the dispute and one appointed by the mediation and arbitration body. Cases unresolved by mediation or voluntary arbitration are referred to the labour court.

Mediation is getting more institutionalised into labour mediation and arbitration centres, which were extended to all provinces in 2012.¹² The mediation and arbitration centre (COMAL) is extended to all the provinces and reports indicate that in 2010. Since it took effect in 2010 and up to June 2013, 31,133 cases were received, and agreement by mediation was reached in 20,952 of them.¹³

National Labour Advisory Commission (*Comisión Consultiva del Trabajo - CCT*)¹⁴

The tripartite CCT analyzes and gives advice on: restructuring and development policies, participation of representative organizations of employers and workers and comments the ILO's standard-setting instruments.

Mediation is a compulsory step according to the Labour Law, however in 2011 the constitutional court declared this unconstitutional. The CCT has called for the constitution to be amended so it can become compulsory.¹⁵ It has not yet been solved.

There has been a row over two ad-hoc public holidays on 2 and 3 January between CTA and the Government in the first CCT session in 2014. It led to the resignation of the head of the CTA's labour portfolio.¹⁶

Other bi/tripartite organs¹⁷

- National Social Security Institute (INSS)
- National training and professional institute (INEFP)
- NEPAD
- PARPA
- PARPA II
- Resolution and Arbitration Forum
- Mozambican deputy group

National Labour Legislation

Constitution¹⁸

The constitution from 1990 guarantees the freedom of association and unions. It recognises to strike except in essential services and prohibits lockouts. The constitution also guarantees the right to work, fair remuneration, health and safety at work, equal pay for equal work. It prohibits forced and child labour. It also specifically mentions different industrial sectors and means of production.

Labour Law¹⁹

The Labour Law of 2007 sets general principles and regulates individual employment relations, such as for hiring, firing, working hours, remuneration, occupational safety and health, vocational training, social security and labour inspection. The law also regulates collective labour relations, by regulating and establishing rights of trade unions and employers' organisations.

Several other legislations exists which regulates and sets standards and restrictions for the labour market.²⁰

ILO Conventions

Ratified ILO Conventions ²¹		
Subject and/or right	Convention	Ratification date
Fundamental Conventions		
Freedom of association and collective bargaining	C087 - Freedom of Association and Protection of the Right to Organise, 1948	1996
	C098 - Right to Organise and Collective Bargaining Convention, 1949	1996
Elimination of all forms of forced labour	C029 - Forced Labour Convention, 1930	2003
	C105 - Abolition of Forced Labour Convention, 1957	1977
Effective abolition of child labour	C138 - Minimum Age Convention, 1973	2003
	C182 - Worst Forms of Child Labour Convention, 1999	2003
Elimination of discrimination in employment	C100 - Equal Remuneration Convention, 1951	1977
	C111 - Discrimination (Employment and Occupation) Convention, 1958	1977
Governance Conventions		
Labour inspection	C081 - Labour Inspection Convention, 1947	1977
	C129 - Labour Inspection (Agriculture) Convention, 1969	Not ratified
Employment policy	C122 - Employment Policy Convention, 1964	1996
Tripartism	C144 - Tripartite Consultation (International Labour Standards) Convention, 1976	1996
Up-to-date Conventions		
Working time	C014 - Weekly Rest (Industry) Convention, 1921	1977
<i>Fundamental Conventions are the eight most important ILO conventions that cover four fundamental principles and rights at work. Equivalent to basic human rights at work.</i>		
<i>Governance Conventions are four conventions that the ILO has designated as important to building national institutions and capacities that serve to promote employment. In other words, conventions that promotes a well-regulated and well-functioning labour market.</i>		
<i>In addition, there are 71 conventions, which ILO considers "up-to-date" and actively promotes.</i>		

CTA, OTM-CS and CONSILMO presented observations on seven ILO conventions; and the ILO's Comments of the Committee of Experts (CEACR) had direct request on the application of the following conventions: i) Equal Remuneration Convention (No. 100), ii) Discrimination

(Employment and Occupation) Convention (No. 111), iii) Employment Policy Convention (No. 122), and iv) Tripartite Consultation (International Labour Standards) Convention (No. 144).²²

Trade Union Rights Violations

The International Trade Union Confederation (ITUC) registered undue interference by authorities during the course of a strike in May 2013. Health workers went on strike for ten days in May 2013 and halted operations in health institutions demanding wage increases, standardization and the readjustment of emergency room prices. The president of the *Associação Médica de Moçambique* was arrested by police and accused of sedition for having instigated strike action. He was released a few hours later.²³

According to the U.S. Annual Human Rights Practices Report²⁴, the government did not effectively enforce many of its labor laws, largely due to lack of resources to investigate abuses, although the government occasionally made efforts to do so, including fines for companies that violated labor laws and regular expulsion of foreign workers for abuses. Penalties for violations of labor laws are not common and are not sufficient to deter violators. There were observed occasionally lengthy procedural delays and appeals.

It was reported that companies have continued to engage in antiunion discrimination by replacing pro-union workers at the end of their contracts and dismissing workers for striking. The government has occasionally also used intimidation to suppress the activities of workers organizations, e.g. the just mentioned case of the president of the *Associação Médica de Moçambique*.

There are moreover numerous reports of forced labor and forced child labor in the domestic and agricultural sectors. Women and girls from rural areas, lured to cities with promises of employment or education, but ended up exploited in domestic servitude. Women and girls from Zimbabwe and Malawi who voluntarily migrated to the country were subsequently exploited in domestic servitude.

During 2013 there were registered 13,850 violations of Mozambican labour legislation that came to the notice of the General Inspectorate of Labour (IGT). It has been argued that poor labour relations has been a by-

product of increased investment, i.e. the increase in national and foreign investment, motivated by the avalanche of natural resource discoveries that brought with it a sharpening of relations between employers and workers, according to the IGT. Workplaces were found to lack basic health and safety conditions, and agreements reached through collective bargaining were often violated. In some companies, the employers simply banned trade union activity.²⁵

In January 2014 more than 200 construction workers gone on strike in a protest of alleged beatings by their Chinese employers, poor working conditions, and end-of-year bonus has not been paid.

The National Union of Mozambican Peasants (UNAC) condemned in February 2014 that rural population is increasingly facing killings, massive forced displacements, and general climate of violence. It has been argued that there are widespread attacks and military clashes between alleged armed men of the Mozambican National Resistance (Renamo) and the Mozambican military forces, which affect the security of the Mozambican peasants and their cultivation of their lands. It can lead to impacts on the upcoming harvest. UNAC has focused on the situation of 69,000 peasant families affected by forced displacement, harassments and threats. Organizations are very concerned that widespread systematic violations of the economic and social rights of the peasants can deteriorate further.²⁶

It has been reported that frequent worker complaints have included failure by employers to deposit social security contributions that had been deducted from wages, inability to obtain social security benefits, unlawful firings, and intimidation of union members.²⁷

Regarding ILO's Freedom of Association cases, Mozambique has no cases.

Cases/information in this section covers the period 2013- 2014 (September).

Working Conditions

Wages and earnings			
Monthly average of minimum wages			
	Source	Metical current	US\$ current
Minimum wage (lowest) (2014-15)	WageIndicator.org ²⁸	2,857	92
Minimum wage (highest) (2014-15)		7,465	241
Minimum wage for a 19-year old worker or an apprentice (2013)	Doing Business ²⁹	3,464	112
Ratio minimum wage to value added per worker (2013)		1.35	
Wage Share Unadjusted (2009)		26 %	
Growth of real average wage (2008-2012)	Global Wage Database ³⁰	15 %	
Growth of real minimum wage (2004-2011)		32 %	

The minimum wage is usually raised every year at the 1st of May and based on the CCT tripartite negotiations forum between the government, trade unions, and the employers' association. There are nine minimum wages in different industries, with the highest monthly minimum wage in Financial Services at 7,465 metical (US\$241) per month, and the lowest in Agriculture at 2,857 metical (US\$92). The manufacturing industry had a minimum wage of 4,400 metical (US\$142) per month.

OTM-CS has previously stated that under current minimum livable conditions to provide for a family of five, the minimum wage should reach 7,900 metical (US\$266) per month. Thus, the minimum wages remain under the minimum livable conditions.

The Ministry of Labor has not effectively enforce health, safety, and wage laws, and the government only occasionally fined or closed firms for noncompliance. There continued to be significant violations of labor laws in many companies, and the infrequency of sanctions for violations created little deterrent to continued violation.³¹

Many employers are reported not to implement the new minimum wages. Health and environmental laws exists to protect workers, but these laws were not always enforced. There were significant violations of labour laws in several companies and industries.

The wage share of labour is medium for the Sub-Saharan region. At 26% it ranks 7 out of 17 Sub-Saharan countries. With a monthly minimum wage of around US\$132 in the manufacturing sector, the minimum wage is still higher than many other African countries, where the national minimum wage tends to be around US\$40-US\$80 per month.

Many Mozambicans supplemented their income with secondary economic activities. Most were self-employed without employers (75%), and secondary activities were most common in the sectors of agriculture (37%), trade & retail (30%) and the manufacturing industry (21%). The overwhelming reason given (90%) for secondary activities, was that it provided extra needed income.³²

Another survey from 2009 reported working conditions for urban workers, with the breakdown below. The survey shows that work is often in unsafe environments, many either few or many hours, and many are not aware of their rights or the safety risks of their work.³³

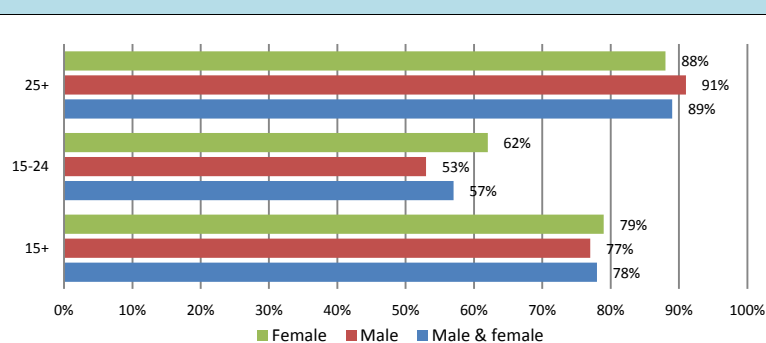
Working conditions (%) (2009)³⁴	
Physical work environment and risks	
Physical hazards (% of workers who are exposed to the following hazards around 3/4 of the time or more)	
Noises	27 %
High temperatures	18 %
Smoke, fumes, dust	31 %
Dangerous people (thieves, poachers and so on)	18 %
Being well informed of safety risks	44 %
Work and health	
Work affects your health	32 %
Absent due to health problems (% over the past 12 months)	18 %
Awareness of legal entitlements	
Minimum wage	64 %
Working Time	59 %
Maternity protection	71 %
Weekly working hours	
Short hours (less than 30 hours)	22 %
Long hours (more than 50 hours)	59 %

From January to August 2013, there were 336 registered workplace accidents, eight of which resulted in the deaths of workers. Most accidents occurred in the agriculture sector.

Workforce

Employment rates³⁵ (2012), Age and Sex distribution

Sex	Age	Employment rate
Male & female	Total	15+ 78 %
	Youth	15-24 57 %
	Adult	25+ 89 %
Male	Total	15+ 77 %
	Youth	15-24 53 %
	Adult	25+ 91 %
Female	Total	15+ 79 %
	Youth	15-24 62 %
	Adult	25+ 88 %



Mozambique's total population is 25.2 million out of which 11.6 million are the economically active population. The formal sector is estimated to be only about 700,000 jobs. It is projected that 300,000 youths join the labour force every year.

Men and women have the same employment rate. Women have a slightly lower rate than men at age 25+, but females have a significant higher rate in their youth. The lower employment rates for men in their youth would usually imply that young men are prioritizing education and therefore less active on the labour market. Though women have lower education levels, their enrolment into schools is only slightly lower than men. Youth unemployment rates are also lower for men, so the statistical difference is not because of more men being unemployment. Overall, that women age 15+ have higher employment rates than men is unusual for most economies, and indicates that women are very active participants on the Mozambican labour market.

Mozambique's working poor is more numerous than the Sub-Saharan Africa's average. It is estimated that 60% of workers in employment are living for less than US\$1.25 a day. There is 25% more working poor in Mozambique in comparison with the Sub-Saharan Africa's average of 45%.

Consistent with its many working poor, Mozambique had a small middle class, with only 7% living for US\$2-4 a day and 2.6% for US\$4-20 a day, compared to Sub-Saharan Africa where 14% lived for US\$2-4 a day and 10% for US\$4-20 a day.³⁶

The country has experienced years of high economic growth and it is expected to continue to increase, due

to new coal and gas extraction. However, the growth has largely been in the extractive industries, which create few jobs compared to investments. Potential investors are also aware that severance payments and other benefits can be costly. Domestic skilled labour is especially scarce in the booming extractive industries.³⁷

Working Poor³⁸ Age 15+

Region	Share of workers in total employment	
	1.25 US\$ a day	2 US\$ a day
Mozambique (2008)	58 %	82 %
Sub-Saharan Africa (2008)	45 %	68 %
Sub-Saharan Africa (2012)	40 %	64 %

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

Making a new business in Mozambique is still not easy, but improving. The country stands at 95 in the ranking of 189 economies on the ease of starting a business, which is better than the Sub-Saharan Africa's regional average of 124. For example, the country has a lower cost required to complete procedure of starting a business. In 2012, the Council of Ministers approved the revised Simplified Licensing Regime that served to simplify even further the licensing of economic activities. As a result a larger number of micro, small and medium enterprises benefit from easier and less costly business start up procedures.³⁹

Unemployment and underemployment

Unemployment, youth unemployment and underemployment ³² (2004/05)			
	Un-employment	Youth Unemployment age (15-19) - (20-24)	Under-employment
Total	19%	37% - 27%	13%
Urban	31%	57% - 45%	10%
Rural	13%	26% - 17%	14%
Male	15%	37% - 23%	17%
Female	22%	37% - 30%	8%

Somewhat outdated information exists on unemployment and underemployment from a labour force survey of 2004/05. The unemployment rate was rather high at 19%. Unemployment was more common in urban areas, and in particular among the youth. Women were more likely to be unemployed than men, both in general and the youth. The unemployment number is very high considering the general poverty and lack of social protection in Mozambique, and likely covers persons, who have some mean of support.

The concept of underemployment does sometimes also include those who are employed below their skill-level, whereas the measure for Mozambique is confined to time-related underemployment, indicating those who involuntarily worked less than 40 hours per week.

Underemployment was more common in rural areas, because many rural men are underemployed, likely because of seasonal changes in activity.

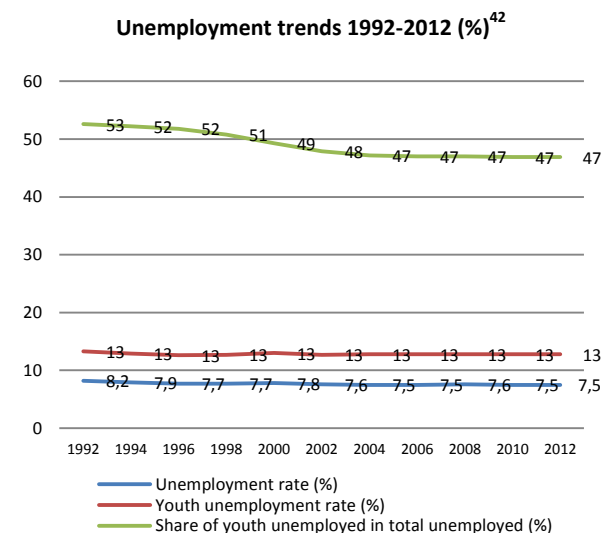
The survey also showed that underemployed women tend to be in urban areas, whereas underemployed men tend to be in rural areas. Underemployment is about the same level for youth as for the total labour force.

Urban youth unemployment is a large problem. As with most other African countries, the formal sector

grows too slow to absorb the estimated 300,000 young people entering the labour market each year, and many therefore end up in unemployment or informal jobs.⁴⁰

Interpretation of the open unemployment and employment rates as indicators of a well-functioning labour market is problematic in developing countries. When unemployment is not an option where a person can survive, work of some sort has to be found, often casual and informal work. Unemployment should therefore be understood in relation to the strength of social safety nets, the prevalence of informal employment and how much of informal employment is underemployment due to few formal employment possibilities.⁴¹

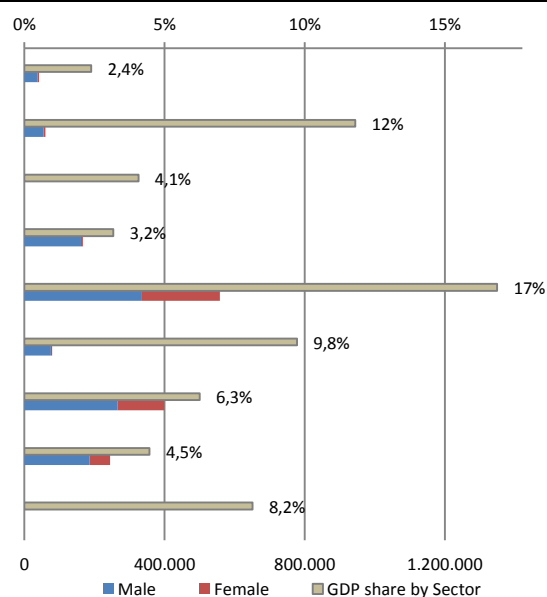
Based on ILO's estimations for the period 1992-2012 the total and youth unemployment rates have been quite stable. The share of youth unemployment in total unemployment has experienced a slight decrease from 53% to 47% in the mentioned period. Both the men and females rates are practically on the same unemployment rate. These numbers diverge a little from the labour force survey of 2004/05 which is mainly due to technical and statistical issues.



Sectoral employment

Employment (2003)⁴³ & GDP share (2012)⁴⁴ Sector & Sex distribution – (Graph without Agriculture)

Sector	Male employment	Female employment	GDP share per sector
Mining and quarrying	37,200	4,600	2.4 %
Manufacturing	54,793	5,574	12 %
Electricity, gas and water	0	0	4.1 %
Construction	161,508	4,975	3.7 %
Trade, restaurants and hotels	332,755	225,219	17 %
Transport and communication	75,730	3,059	9.8 %
Finance, real estate and business services	265,744	133,191	6.3 %
Public administration, education & health	186,221	58,765	4.5 %
Other services	N/A	N/A	8.2 %
Agriculture	2,507,329	3,881,815	33 %



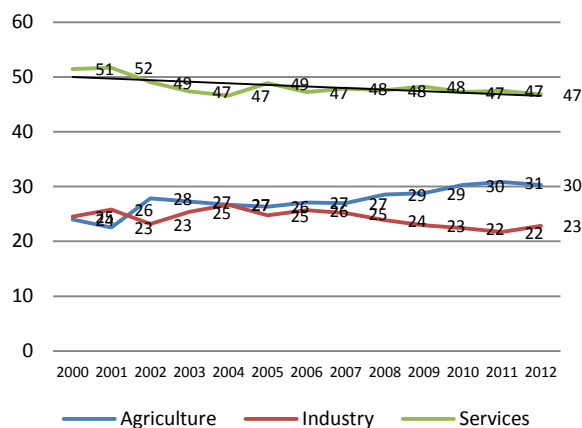
Agriculture is by far the single largest employment sector in Mozambique, employing around 80% of the labour force, and contributes with 33% of GDP. The large difference between people employed in agriculture and the contribution to GDP is reflected in other sectors, where there is a much higher contribution to GDP compared to workers in the sectors, e.g. Trade, Restaurants & Hotels employ 7% of the labour force and produce 12% of GDP as well as the Manufacturing sector covers 0.8% of the labour force and contributes to 12% of GDP.

It is far more common for women to be working in agriculture (90%) than men (70%). Outside agriculture, women find employment in trade, business services and public administration. All of these sectors have more men employed.

Unlike most other African countries, the GDP share of agricultural is growing at the expense of especially the service sector. Cereal yields have increased steadily

since a low in 2005, though agricultural yields are otherwise reported to have been stagnant in the last decade. Around 95% of agricultural workers work on small plots with little technology or access to extension services.⁴⁵

Sectors Share (% of GDP)⁴⁶



Migration

Migration ⁴⁷		
Net migration (2008-2012)	Mozambique	- 25,000
Net migration to average population per year (2008-2012)	Mozambique	- 1 : 4,794 inhabitants
	Sub-Saharan Africa	- 1 : 2,838 inhabitants
Personal transfers i.e. remittances received, % of GDP (2012)	Mozambique	1.5 %
	Sub-Saharan Africa	2.4 %

In terms of personal remittances, Mozambique receives 1.5% of GDP, which is lower than the Sub Saharan Africa's average. Considerably fewer people also migrate out of Mozambique at a rate of 1 out of every 4,794 inhabitants, however years of high economic growth has also attracted many migrants, which are deducted in the net migration. The top three destinations for migrants are South Africa, Malawi, and Zimbabwe.⁴⁸

The high growth rates and shortages of skilled domestic labour have also created a demand for skilled foreign labour. With a certain historical irony, many unemployed Portuguese have moved to Mozambique to find jobs in the last couple of years.⁴⁹

Almost 12,000 foreign nationals applied for work registration in the first nine month of 2012, and 11,000 in the same period in 2011.⁵⁰

The high population mobility, including cross border travel has been identified as one of the key drivers of the AIDS epidemic in Mozambique. The rehabilitation of the transport and communications systems that led to the movement of workers within and outside the country, have held serious implications for the spread of the epidemic.⁵¹ Currently, the prevalence of HIV refers to the percentage of people ages 15-49, who are infected with HIV, is 11%, which is double as high as the average in Sub-Saharan Africa.

The Southern African Development Community's (SADC) Ministerial-level Migration Dialogue for Southern Africa recently debated ways of enhancing labour migration and migration management. It was among others mentioned that in Mozambique recent coal finds and exploration can potentially lead to migration from neighboring states. It was argued that it is important to open legal channels for labour migration from neighboring countries to avoid increases in irregular migration.⁵²

Informal Economy

The Ministry of Planning and Development has estimated that informal activity represented 40% of GDP. Thus, the informal sector plays a key function in the economic growth and it also a source of income for the majority of the poor population. However, both national and local governments have only recently begun to acknowledge the informal economy's contribution to the economy. Policies improving the business environment are not supporting the small household enterprises, though.⁵³

A non-agricultural enterprise census revealed that the median firm in Mozambique has only two workers, while 78% of firms have up to only five workers. Many of these firms are likely to be informal at least to some degree. It is also noteworthy that informal enterprises have a productivity premium from holding a registration document, since it allows them to concentrate on business rather than on evasion techniques. According to the survey, 60% of the enterprises are unaware of their illegal status.⁵⁴

The Friederich Ebert Stiftung has estimated that 5.1% of the total labour force is in formal employment. Most informal employment is in subsistence farming. Total employment and self-employed constitute 91%. Outside agriculture, the informal sector is still the largest employer, and it grows at a rate of around 8%

Child Labour

Child labour is common in Mozambique and at 22% it is a little lower than in Sub-Saharan Africa's average. Child labour is higher in rural areas (25%) than urban (15%). Girls (24%) were slightly more likely than boys (21%) to be engaged in child labour. Older children at the age 12-14 (27%), were also more likely to be engaged in child labour than younger at the age 5-11 (21%).

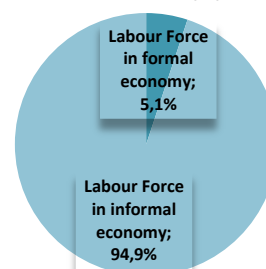
The HIV/AIDS pandemic is a major cause of child labour in Mozambique. Children, who have lost one or both of their parents, are more likely to be engaged in child labour.⁵⁷

By law children must be paid at least the minimum wage or a minimum of two-thirds of the adult salary, whichever is higher.

The Ministry of Labor regulates child labor. Labor inspectors may obtain court orders and use police to enforce compliance with child labor provisions. There are no mechanisms in place for submitting complaints about hazardous and forced child labor, though. On the other hand, enforcement mechanisms generally

per year. As previously mentioned, this is largely because the formal sector produces too few jobs to absorb the estimated 300,000 young people entering the labour market each year who therefore end up in informal jobs.

Labour force in formal/informal economy in % of total labour force (%)⁵⁵



Association of Informal Economy Operators and Workers (ASSOTSI) is an informal workers association and fully affiliated of OTM-CS. With around 60,000 members, it is also the largest single organisation associated to OTM-CS. There are additionally three other associated organizations from the informal economy.⁵⁶ The union of domestic workers is also created.

were adequate in the formal sector, but remained poor in the informal sector.

Working children			
Proportion of all children in age group			
Region	Year	Type	Proportion
Mozambique ⁵⁸ (age 5-14)	2008	Child labourers	22 %
Sub-Saharan Africa ⁵⁹ (age 5-17)	2008	Children in employment	28 %
		Child labourers	25 %
		Hazardous work	13 %
<i>Children in employment include all children who conduct some kind of work, whereas child labourers are a narrower term without mild forms of work. Hazardous work is the worst form of child labour as defined in ILO C182.</i>			

The Council of Ministers approved the new National Plan of Action for Children (2013–2019). The Government also began preparing the National Plan for Eradication of Child Labour to be presented jointly with the members of the Community of Lusophone Countries at the Global Conference on Child Labor in 2013.⁶⁰

Gender

Mozambique is a highly patriarchal society. Women have a limited control over household resources and female-headed households are still poorer than their male-headed counterparts.

The strongest signs of change in gender relations in Mozambique have been in urban areas. This is due to women in male-headed households in cities and towns have a stronger influence on decisions than their rural counterparts. However, it is still necessary for the large majority of women, both in rural and urban areas, to consult the male heads of the families before decisions are taken, e.g. education, health, and food.

Decision making responsibility in male headed households (%) ⁶¹						
Themes	Rural areas			Urban areas		
	Male	Spouse	Both	Male	Spouse	Both
Education	100%	0%	0%	89%	3%	9%
Health	96%	0%	4%	78%	10%	12%
Food	64%	21%	15%	65%	19%	15%

Youth

Mozambique has a high population growth rate at 2.8% per year and an estimated 300,000 new entrants into the labour market every year. Thus, urban youth employment is a big challenge.

The high economic growth in the last decade has been driven by capital-intensive investments, e.g. extractive industries. It has not created sufficient employment for youth entering the formal labour force but forced into marginal jobs in the informal economy.

The two sectors that traditionally generate significant employment for youth are: agriculture and small & medium-sized enterprises (SME). Unfortunately only a minority of farms have access to services and markets. Regarding the SME, sector accounts for 43% of employment and has been growing at 7% a year, but is constrained by lack of access to affordable capital, heavy 'red tape' and a poor business climate.⁶²

As noted elsewhere in this report: Fewer girls enrol in schools than boys, especially in tertiary education, but the gender differences are smaller than the Sub-Saharan Africa average. Women have less education than men, though Mozambique has the lowest education level in the world. Slightly more girls are engaged in child labour than boys. Women have higher rates of employment than men, because more young women participate on the labour market. It is far more common for women than men to be working in agriculture. Women have higher rates of unemployment, youth unemployment, but lower rates of underemployment, because many rural men are underemployed.

There is a strong contingent of bodies that specifically represent women, such as the Mozambican Association of Women in Legal Profession, the Association of Rural Women (AMRU), and the Committee of the Working Woman of the Organization of Mozambican Workers (COMUTRA).

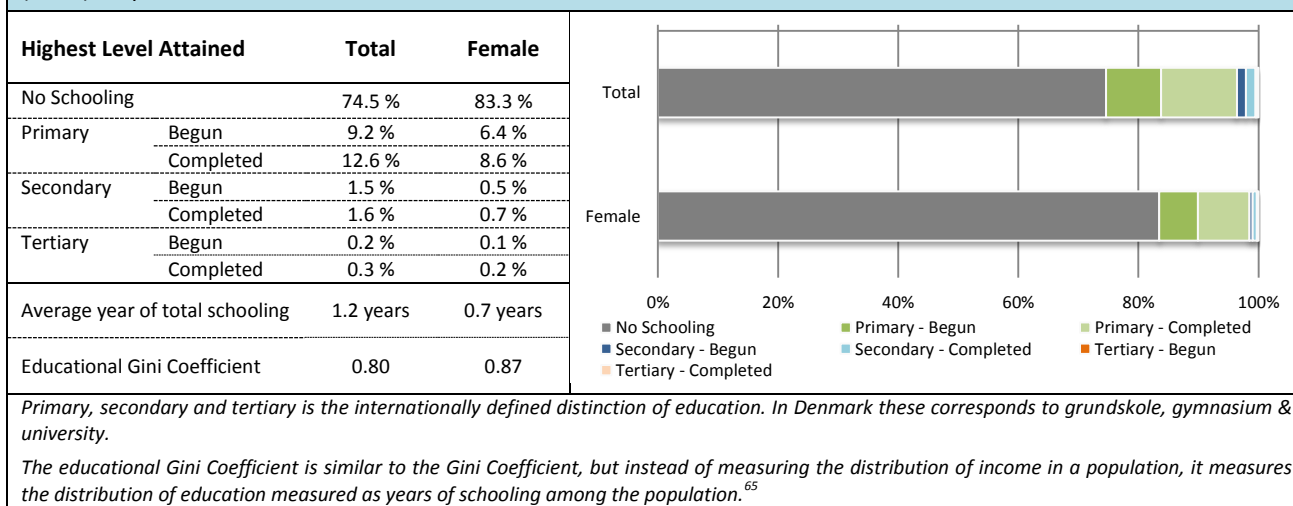
The government operates with development strategies where employment is a priority. But, there is no specific strategy for promoting youth employment.

A low skills level of the labour force remains a significant issue both for employers, who are unable to engage qualified labours, and promoting culture of entrepreneurship.

In October 2013 the parliament approved a new youth policy. It includes priorities of technical and vocational education as well as fostering employment and entrepreneurship. In addition, Mozambique has a National AIDS Strategic Plan, a National Education Strategic Plan and Operational Plan for AIDS, which all includes sections dedicated to youth.⁶³

Characteristics of the Working Age Population

Highest level attained and years of schooling in the population ⁶⁴ (2010), Population 25+, Total and Female



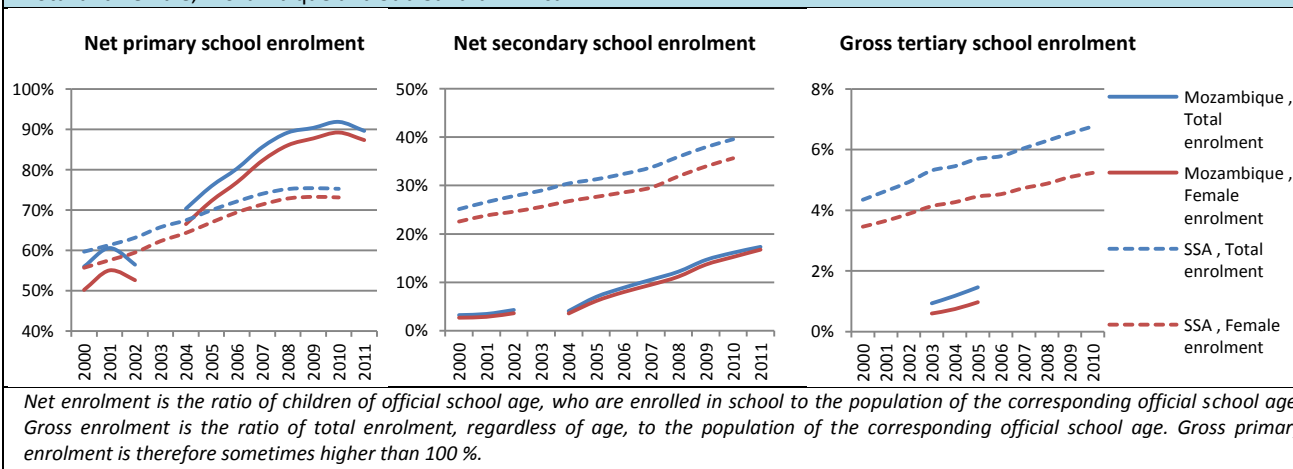
With only 1.2 years, Mozambique has the lowest of average schooling per capita in the world. It is in stark contrast to neighbouring countries such as Zimbabwe and Zambia, with averages of 7.3 years and 6.7 years, respectively. Of those who have education, most have however completed primary education.

Undoubtedly, the 15 year long civil war, which ended in 1992, and later political conflict between the FRELIMO and RENAMO parties, caused a deterrent on enrolling into education. The civil war did destroy vital infrastructure including schools; as well as a lot of

Mozambicans also have no schooling because the Portuguese rule actively prevented schooling and therefore affected empowerment of the local population.

Women are underrepresented in all types of education, having less total schooling and a more unequal distribution of the education among women. The graph above shows the educational attainment of all Mozambican above 25 years, therefore gives a glance of the human capital of the labour force.

Enrolment in Primary, Secondary and Tertiary schools (2000-2011)⁶⁶ Total and Female, Mozambique and Sub-Saharan Africa



Enrolment rates into primary education is higher than Sub-Saharan Africa, as primary schools have are free and compulsory, though registration fees are required. Enrolment into both secondary and tertiary education is much lower in Mozambique than other Sub Saharan African Countries, though no recent data exists for enrolment into universities. Only around 92% of students in secondary schools completed their education in 2008, limiting their skills at the labour market skills. Dropouts were mainly due to financial constraints.⁶⁷

Vocational training

Vocational Training ⁶⁹		
Pupils in vocational training (2012)	Mozambique	32,231
Ratio of pupils in vocational student to all pupils in secondary education	Mozambique	5.2 %
	Sub-Saharan Africa	7.6 %
Ratio of pupils in vocational training out of 15-24 year olds	Mozambique	0.7 %
	Sub-Saharan Africa	2.0 %
<p><i>Mozambique's ratio of pupils in vocational training to all pupils in secondary education were calculated on average for the period 2008-2012, while the Sub-Saharan Africa region is an average of the period 2008-2011.</i></p> <p><i>The 15-24 year olds are calculated as an average in the period 2005-2015.⁷⁰</i></p>		

It is registered that a little more than 32,000 pupils were enrolling in vocational training in 2012. The ratio of pupils in vocational training to all pupils in secondary education is slightly lower than the average in the Sub-Saharan Africa. It is noted that if the country's secondary education enrolment rate was increased to the regional's level, this ratio would be much lower.

The Ministry of Labour's Institute for Employment and Training manages a network of company-owned vocational training and employment centers. The former offer short (one to six month) practically orientated vocational courses unemployed or out-of school youth. The Institute also develops curricula and materials. The funding and provision of youth and adult education is assisted by strong partnerships between the government and international donors, NGOs and churches, which are seen as key government allies in program implementation.

Data from the National Vocational Training Institute (IEFP) show that 156,000 students graduate per year.

According to the African Development Bank,⁶⁸ the low skills level of the labour force remains a significant issue both for employers who are unable to engage qualified labourers as well as for promoting a culture of entrepreneurship. The low education level has led some foreign companies to import labour, and the government has therefore set a quota on number of foreign workers per enterprise.

Since 2006 it has had in place an Integrated Program for Professional Education. It has been argued that IEFP needs to increase its output and update its training courses' curricula.⁷¹

A new law on professional education was approved in July 2014. Based on an analysis by the Government, a National Authority for Professional Education (PIREP) has been in focus, which includes a comprehensive steering committee composed of the Ministries of Education and Labour, trade unions, and private sector representatives. This institution is directed to be responsible for coordinating the decentralization and rollout to the provinces of professional education centers. It will also be supported by a new Professional Education Fund, financed through at 1% levy on private sector wages. The provincial centers will be steered by local representatives, and work in coordination with the employment centers.

It is estimated that 22% of formal firms in Mozambique are offering formal training.⁷²

There has been under-served vocational training for ordinary union membership. OTM-CS runs a Vocational Training Institute in Maputo that is open to the public, but appears not to meet the demand. The Committee for Trade Union Education and Training (CONEFS), mainly funded by the Danish LO, does address training needs for shop stewards, but with constraints and limitations.⁷³ The other trade union confederation, CONSILMO, has prioritized organization of the vocational training for their members who are mainly in the construction, hotel, and catering industries.

Social Protection

Public spending on social protection schemes ⁷⁴ (2010)		
	Metical	6.4 billion
	US\$	187 million
Public social protection expenditure, excl. health	% of GDP	2,0 %
	per capita	7,8 US\$
	% of government expenditure	16 %
Public health care	% of GDP	3,3 %
Health social protection coverage	% of population	4,0 %
Trends in government expenditure in health	% changes per year (2007-2011)	-1,4 %

Benefits, coverage and contributions to pension schemes ⁷⁵ (2008-2011)		
Social benefits for the active age	% of GDP	0.12 %
Pensionable age receiving an old age pension: men 60+/women 55+	Proportion of total	17 %
Contributing to a pension scheme	Economically active population	4.2 %
Active contributors to a pension scheme	15-64 years	3.8 %

All workers are entitled to social security in the Labour Law. In practice, the social insurance coverage is very low since social insurance coverage has been restricted to salaried workers. The coverage is limited when compared to the number of economically active individuals. It is estimated that only a little more than 234,000 contributed out of 731,000 workers were registered in the system in 2008. It was a small fraction of the total 11.6 million economically active workers. It is registered that merely 4% of the population is covered by health social protection and 3.8% are active contributors to a pension scheme. Only 26,437 retirees received pension benefits.⁷⁶

The government makes improvements in the direction of a national social protection floor. Among others, there was an approval in 2010 of the Regulation for Basic Social Security, and the National Strategy for Basic Social Security (ENSSB) that paved the way to extend coverage and improve efficiency in delivery of social security benefits. The Regulation was a step forward establishing universalization as a goal, but the extension of the schemes will be gradual, in accordance with national capacity.⁷⁷

Social protection system in Mozambique has three levels:⁷⁸

First, compulsory social insurance is for formal private and public workers giving sickness allowance, relocation allowance, old-age pension, disability pension, survivor's pension, funeral benefit and maternity allowance. About 2% of the workforce is covered by this scheme.

Second, complementary social security is optional higher pensions for workers in the compulsory social insurance.

Third, non-contributory Basic Social Security is transfers and welfare services to the most vulnerable. It involves the food subsidy programme to the elderly, ill or disabled; and direct support programme to those who require immediate assistance. In 2012 the Basic Social Subsidy Programme (PSSB) for households with no adults able to work, and the public works programme, for households with an adult able to work, reached over 300,000 extremely poor households. The minimum transfer value is 130 metical (US\$4.8) per household per month, with increments of 50 metical (US\$1.8) per month for dependents and up to a maximum of 380 metical (US\$14) per household per month. Beneficiaries are paid in cash, and the recipient is generally the head of the household.⁷⁹ Three additional development schemes are part of the basic social security scheme. These are a micro credit scheme with 5,000 beneficiaries in 2007; a labour market integration scheme with 3,000 beneficiaries in 2007; and a region support scheme which supported 280 communities in 2007.

Few social protection mechanisms exist for the informal and self-employed workers which are small family or community run schemes. However, the social security law of 2007 aims to extend the compulsory social insurance system to self-employed workers. The social security system is therefore open for informal or self-employed workers. There is an addendum to the law of social security, which entitles these workers to be part of the system. The system is not yet well organized, though, and therefore many of the people from the informal sector are not registered.

General Economic Performance

Key Facts ⁸⁰ (2013 est.)				
GDP (US\$)	GDP per capita (PPP) (US\$)	GDP real growth	Human Development Index ⁸¹ (2012)	Gini Index (2008)
14.7 billion	1,200 214 of 229 countries	7 %	0.327 185 of 187 countries	45.6 37 of 139 countries
<i>The Human Development Index (HDI) measures the average of a long and healthy life, access to knowledge, and a decent standard of living.</i> <i>In terms of the ranking the Gini Index, the first country has the highest inequality while the number 139 has the highest equality.</i>				

Doing business ⁸²	Control of corruption	Government effectiveness	Rule of Law
127 of 189 countries	-0.49 (2007) -0.59 (2012)	-0.48 (2007) -0.64 (2012)	-0.60 (2007) -0.60 (2012)
<i>A high ranking on the Ease of Doing Business Index means the regulatory environment is more conducive to the start-up and operation of a local firm.⁸³</i> <i>The selected Governance Indicators⁸⁴ cover the years 2007 and 2012, and ranging from -2.5 to 2.5; i.e. negative tendencies below the zero mean and unit standard deviation, score negative measurements.⁸⁵</i>			

Mozambique's transition from a post-conflict country to one of Africa's "frontier economies" has demonstrated an impressive economic growth during a long period on an average at 9%. In 2013 the country has an estimated 7% growth. Mozambique is dependent of foreign assistance and it was assessed to cover 40% of its national budget in 2012.

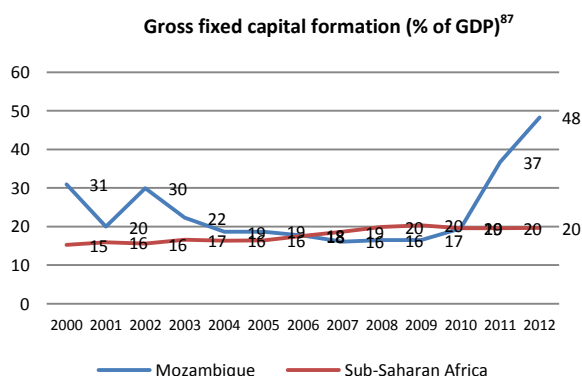
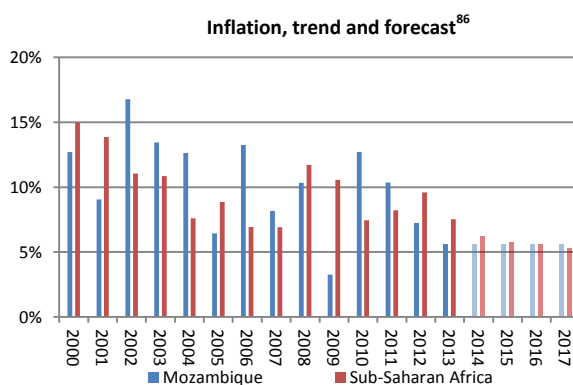
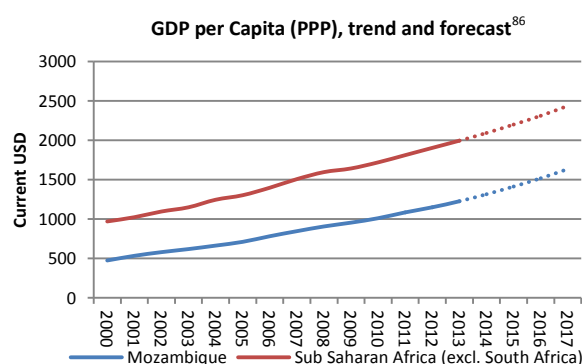
The long periods of growth has not been matched by job creation or reduction in poverty. With a GDP per capita, measured in Purchasing Power Parity (PPP) at US\$1,200, Mozambique is a very poor country, and projected to stay behind the Sub-Saharan Africa's average for years. Mozambique also has one of the lowest ranks in the world on the Human Development Index.

Inflation is under control and is likely to stay anchored by the authorities' medium-term target at 5-6%. The gross fixed capital formation has skyrocketed since 2010 and it is related to new coal and gas extraction.

Inequality is increasing in Mozambique despite the impressive economic growth. The Gini Index ranks Mozambique at a medium to lower end as 37 out of 139 countries. There is a big challenge to diversify the sources of economic growth, develop the agriculture

sector as well as improving the provision of public goods and set up the Social Protection Floor.

The Doing Business indicator places Mozambique medium to low, with a slightly improved ranking from 142 in 2013/14 to 127 in 2014/15 out of 189 countries in 2013. Mozambique scores high on starting a business and protecting investors, but very low on getting electricity. Mozambique also has medium to low ranks on the selected three Governance indicators, with a slightly decrease in Control of Corruption and Government effectiveness.



Trade

Trade and Foreign Direct Investment ⁸⁸ 2013 (est.)			
Exports	Imports	FDI flow ⁸⁹ (average 2008-12)	FDI Stock
3.9 billion US\$	7.1 billion US\$	2.1 billion US\$	N/A
24 % of GDP	48 % of GDP	15 % of GDP	

With an export at 24% and an expanding import at 48% of GDP, trade plays an important role in Mozambique's economy. Also the Foreign Direct Investments (FDI) rate has exploded since 2011, reaching US\$5.2 billion just in 2012.

Exports are dominated by aluminium coming from the Mozal smelter plant. Large tax exemptions of the smelter were given to the investors to attract foreign investment. The tax exemptions mean that of every US\$1 being paid to the government from the plant, an estimated US\$21 leaves the country.⁹⁰

Coal extraction has begun in the Tete province and is expected to grow substantially in the coming years, as it is the largest untapped coal reserves in the world. Also newly discovered gas reserves are further expected to boost exports, which in the long term could almost double Mozambique's GDP.⁹¹

However, there is no guarantee that the increased income will benefit the wider public, as corruption is already common in Mozambique, many other African countries have experienced similar resource bonanzas with wealth benefitting the few, and the extractive industries are capital intensive industries which create few jobs compared to their investment.⁹²

Trade agreements

Mozambique is in the 2000 Cotonou Agreement on development cooperation between EU and African, Caribbean and Pacific (ACP) countries, which reaffirms commitment to ILO's Fundamental Conventions and includes provisions on cooperation on various labour and social issues.⁹³

Since 2000, Mozambique has benefitted from the United States' African Growth and Opportunity Act (AGOA), which is a Generalised System of Preferences. It allows duty and quota free access for some products. Mozambique can be removed from AGOA, if

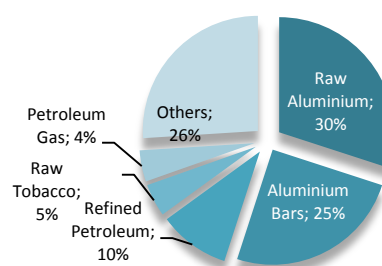
the United States deems that Mozambique among other human rights issues do not seek to uphold the ILO Core Labour Standards and have acceptable minimum wages, hours of work and occupational safety and health.⁹⁴

Export Processing Zones (EPZ)

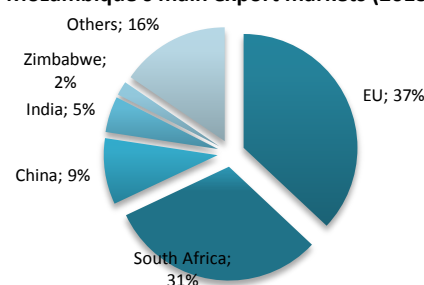
Mozambique has created EPZ facilities for exporters, but they have not worked well. If Mozambique wants to capitalize on the export possibilities made possible by domestic reform and by international opportunities, cleaning up of EPZ facilities is essential. Reform of EPZ facilities and tax administration must be one of the highest priorities in trade policy reform in Mozambique.⁹⁵

The OTM-CS has complained about discrimination against trade unionists in the EPZ, where dismissals of activists and members or violations of collective agreements – where they exist – occur. Furthermore, the right to strike is very difficult to exercise in practice, as the zones are covered by the law on essential services.⁹⁶ However, a draft law on public servants emphasizes that arbitration is compulsory in essential services, the list of which is very broad and includes activities in the EPZ in Mozal.⁹⁷

Main products share of exports (2012)⁹⁸



Mozambique's main export markets (2013)⁹⁹



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