

AFRICA RISK CONSULTING

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Zimbabwe Summary 6 December 2021

The 2022 National Budget doubles its allocation to the agricultural sector, reinforcing the focus on import substitution and diversified exports as the Agricultural Recovery and Growth Plan continues to look promising. South Africa discontinues the Zimbabwean Exemption Permit (ZEP) that allowed Zimbabwean nationals to legally settle in South Africa, threatening ZEP holders' employment and diaspora remittances to Zimbabwe. The newly discovered Omicron variant of SARS-Cov-2 puts Zimbabwe back on the banned travel list of many countries, while the government tightens domestic lockdown measures to counter a potential surge in Covid-19 cases in December. Broken radar systems in Zimbabwe's main airports expose its airspace to security risks and open the country to increasing levels of syndicate smuggling and regional and international air traffic operations. Moderate economic recovery in 2021 has helped Zimbabwe to rebound from worryingly high inflation levels in 2020 as 2022 will see heightened attention on President Emmerson Mnangagwa (2017-present) and the ruling ZANU-PF in the run up to the 2023 elections.

2022 budget gives agriculture a boost ...

Finance minister **Mthuli Ncube's** National Budget for 2022 has almost doubled the allocation to Zimbabwe's agricultural sector. The budget, presented to parliament on 25 November, provides for expenditure of ZWL\$124 billion (\$1.1 billion) in 2022 to support the country's agriculture sector, up from ZWL\$46.3 billion (\$571m) in the 2021 budget.^{1 2} The increase underlines government efforts to boost agricultural production and provide commercial and subsistence farmers with safety nets.

Rapid progress in the agricultural sector is credited with helping Zimbabwe's economy to grow faster than that of its regional rivals. Agricultural sector growth, revised from 12% to 34%, is expected to continue only if the government maintains its focus on strategic agricultural policies that align with the **National Development Strategy One**.³ The government set out the strategy to chart the economy between 2021 and 2025, aiming to achieve Zimbabwe's vision of becoming a middle-income country by 2030.⁴

The country's **Agricultural Recovery and Growth Plan** targets six outcomes: food security, import substitution, diversified exports, value addition, employment, and improved incomes and standards of living. Although maize and tobacco production dominate as sectors that can produce enough for domestic consumption and allow surplus production to be exported for foreign currency generation, alternative crops are making significant progress.⁵ The 2019/2020 maize season produced 907 tonnes of maize, while the 2020/2021 season produced 2.7 million tonnes, correlating for the first time in close to two decades with Zimbabwe not having to import maize from neighbouring **South Africa**, but instead exporting its surplus. **Agricultural**

¹ ZBC News, 1 Dec 2021

² National Budget 2021, 26 Nov 2020

³ ZBC News, 27 Nov 2021

⁴ Reserve Bank of Zimbabwe website, 21 Jan 2021

⁵ Sunday Mail, 28 Feb 2021

and Rural Development Authority (ARDA) board chairman **Ivan Craig** applauded the government's focus on the agricultural sector, noting that attention on grain production, irrigation development and rural development may allow Zimbabwe to regain its status as the region's breadbasket.⁶

It is no surprise that the agricultural sector dominates the 2022 budget allocation as the government aims to tackle both food insecurity and foreign exchange deficits. However, what makes progress in this sector even more promising is the domination of the workforce makeup by rural and young labourers. A lack of viable employment alternatives in urban areas is pushing educated youth to take up farming opportunities either at a subsistence or commercial level.⁷ According to the **Zimbabwe National Statistics Agency**, close to 4 million youths are involved in agricultural activities, aiding Zimbabwe's agricultural recovery and increasing production output in the previously food-scarce region.⁸

While Zimbabwe's economic situation is likely to experience turbulence for the foreseeable future, the role of domestic food production in reducing imports and boosting surplus exports is likely to continue to be vitally important. The significance of the agricultural sector's contribution to GDP– alongside that of mining and tourism – will help Zimbabwe to rebuild its Covid-19 impacted economy and stimulate regional economic development.

South Africa discontinues Zim permits...

The South African government decided on 24 November to discontinue issuing special dispensation permits for Zimbabwean nationals, known as the **Zimbabwean Exemption Permit (ZEP)**. The permits will expire on 31 December, but the government has given Zimbabwean nationals a grace period of one year to attempt to qualify under other recognised permits, or risk deportation.⁹ The move puts at risk over 200,000 Zimbabwean nationals who currently reside in South Africa under this permit, jeopardising their current employment opportunities and foreign currency remittances, as well as cordial relations between the Zimbabwean and South African governments.

The South African government introduced the ZEP in 2009 to legalise the status of the 245,000 Zimbabweans living in South Africa due to the unstable political and socio-economic situation in Zimbabwe. Under this permit, Zimbabweans can apply for jobs and open bank accounts, and are required to pay taxes to the South African government. The final iteration of the ZEP was approved in 2017 and was reportedly set to be renewed again in 2019.¹⁰ The decision not to renew the ZEP is reportedly in response to pressure by opposition parties about the inability of the ruling **African National Congress (ANC)** to deal with migratory issues, and by the poor performance of the ANC in the latest local government elections.¹¹ South Africa has experienced several years of xenophobic violence, where locals have attacked foreign nationals and looted their homes and businesses due to the perception that such foreigners are depriving them of employment opportunities.¹²

Cabinet's announcement has already resulted in concerning developments for ZEP holders. South African banks have sent ZEP holders notices of account closures at the expiry of the ZEP at the end of December, despite the 12-month grace period.¹³ Banks have told affected customers that they must apply for and provide proof of a **Temporary Residence Permit**

⁶ Anadolu Agency, 28 Nov 2021

⁷ Anadolu Agency, 28 Nov 2021

⁸ ZNSA website, 6 Oct 2021

⁹ Herald, 28 Nov 2021

¹⁰ The Daily Maverick, 25 Nov 2021

¹¹ Herald, 28 Nov 2021

¹² The Zimbabwean, 1 Dec 2021

¹³ iHarare, 2 Dec 2021

before 31 December if they wish to keep their accounts open. Banks have also begun to refuse loans and cancelled pre-approved bond applications, which will negatively impact ZEP holders' financial stability in South Africa. Additionally, several employers have reportedly refused to renew contracts with employees who hold the ZEP amid uncertainty over their legal status in the country. **Zimbabwe Exiles Forum** chairperson Advocate **Gabriel Shumba** noted that pensions and many other policies will be impacted:

"Banks, insurance companies and other sectors are likely to start terminating contracts based on the one-year lapse indicated."¹⁴

The discontinuation of the ZEP is also likely to affect diaspora remittances by Zimbabwean nationals living in South Africa. The **Reserve Bank of Zimbabwe (RBZ)** (central bank) estimates that Zimbabwean nationals living abroad send remittances totaling close to \$1 billion (ZWL\$105 billion) annually – more than the country currently receives in foreign aid.¹⁵ While Zimbabweans are spread all over the globe, there is a strong concentration in South Africa due to its proximity and the opportunities it offered during the years of hyperinflation. It will soon become clear whether the discontinuation of the ZEP is a political move to address migration issues or whether the South African government will help those ZEP holders looking to continue the lives they have built in South African over the last decade.

Omicron variant results in tightening lockdown measures ...

The **Omicron** variant of **SARS-CoV-2**, first identified in South Africa during the week of 25 November, has resulted in the **United Kingdom (UK)**, **United States (US)**, **European Union (EU)** and a number of countries in the **Middle East** and **Asia** placing several **Southern African** countries – including Zimbabwe – on travel ban lists.¹⁶ Concerns around the variant highlight how its genetic mutation is vastly different from other Covid-19 variants; however, little is currently known about how this may affect symptoms, vaccine efficacy and preventative measures. Zimbabwe health authorities confirmed that they had detected one case of the Omicron variant on 4 December.¹⁷

In response to the discovery of the new variant, President **Emmerson Mnangagwa** (2017 – present) has imposed mandatory 14-day quarantine for all travellers arriving in the country, including returning residents, at their own expense. Those wishing to enter Zimbabwe will also have to take a Polymerase Chain Reaction (PCR) test at the port of entry.¹⁸ While airlines are still operating within the region, there is widespread uncertainty regarding the operation of international airline operators. **Qatar Airways** announced on 26 November that it will not accept passengers from blacklisted countries wishing to travel overseas on their aircraft.¹⁹

The government has also tightened restrictions within the country. This includes an extended curfew from 9pm to 6am – businesses have been restricted to 7am-7pm operational hours – and restricting access to certain socialising locations and events to those who are vaccinated against Covid-19.²⁰

The seven-day average of new infections reached 131 on 2 December.²¹ The health ministry has recorded a total of 134,625 cases in Zimbabwe's population of 14.86 million, an increase of 1,618 since 8 November.²² Covid-19-related deaths have reached 4,708, up by 29 in the same

¹⁴ Herald, 28 Nov 2021

¹⁵ Africa CGTN, 4 May 2021

¹⁶ JD Supra, 30 Nov 2021

¹⁷ VoA, 4 Dec 2021

¹⁸ Sunday News, 1 Dec 2021

¹⁹ Business Insider, 26 Nov 2021

²⁰ All Africa, 1 Dec 2021

²¹ Reuters, 2 Dec 2021

²² Our World in Data, 2 Nov 2021

time frame. December usually sees a large-scale return of Zimbabwean nationals, as well as an increase in tourism to the country, a factor that was linked to the significant increase in the second wave of Covid-19 in the country in December 2020.²³ This is likely to reoccur this December, with Zimbabwean nationals wishing to return home to see family.

Zimbabwe's Covid-19 vaccine rollout continues to make impressive progress and sets a benchmark for **African** nations. The health ministry continues to administer the **Russia**-manufactured **Sputnik V** vaccine, **China**-manufactured **Sinopharm** and **Sinovac** vaccines, US-manufactured **Pfizer-BioNTech** and **Moderna** mRNA injections, **British-Swedish**-manufacturer **AstraZeneca** and US-based pharmaceutical company **Johnson & Johnson's** adenovirus technology, and **India's Covaxin**. Zimbabwe is set to receive its fifth batch of vaccines from China consisting of one million Sinovac doses as the countries strengthen cooperation in fighting the Omicron variant.²⁴ Around 22.7% of the population is fully vaccinated as the country has administered 6.6 million doses, with vaccination in the last week of November reaching 23,700 doses.²⁵

... as crashing radar systems threaten Zimbabwe's airspace security

The **Parliamentary Portfolio Committee on Transport** has raised significant concerns regarding the efficacy of the operating radar systems in all of Zimbabwe's airports, claiming they expose the country's security aviation systems to several threats. An inefficiently operating radar system is likely to increase the capacity of smuggling syndicates – particularly those involved in mineral smuggling – and heighten the risk of aerospace operations both in Zimbabwe and the region.²⁶

Radar systems, consisting of traffic communications that enable traffic controllers to communicate with pilots and improve surveillance of civilian airspace, ensure the safety of commercial and civilian aircrafts and can prevent undesirable aircraft from using Zimbabwean airspace.²⁷ The **Joint Operations Command (JOC)** – a taskforce of army, police, and intelligence officials - has made requests over the last two years to upgrade Zimbabwe's radar systems. In 2019, the JOC convened to discuss the danger posed to Zimbabwean airspace without adequate radar systems in place.²⁸ The JOC raised concerns about the ability of both mercenaries and smuggling syndicates to enter the country undetected. Although the **Air Force of Zimbabwe** subsequently sent technicians to repair the radar system, it has crashed several times since then.²⁹

The **Civil Aviation Authority of Zimbabwe (CAAZ)** entered into a bid agreement with China-based **Chinese Harbour Equipment Company (CHEC)** in June, awarding it the tender as the sole bidder in a restricted process that excluded Western bidders. The CHEC quoted the CAAZ \$5m (ZWL\$525m) for a new communications system; however, the CAAZ only received \$1.5m (ZWL\$162m) in the 2022 budget.³⁰ CAAZ executives have lobbied the finance ministry for the remaining \$3.4m (ZWL\$357m). Transport and infrastructural development ministry permanent secretary **Theodius Chinyanga** noted that the CAAZ has \$1.5m in its coffers and needs a further \$3.4m:

²³ All Africa, 1 Dec 2021

²⁴ Bulawayo24, 2 Dec 2021

²⁵ Reuters, 2 Dec 2021

²⁶ New Zimbabwe, 3 Dec 2021

²⁷ New Zimbabwe, 3 Dec 2021

²⁸ The Independent, 29 Nov 2019

²⁹ The Independent, 29 Nov 2019

³⁰ Herald, 2 Dec 2021

“This means we are at risk of going into breach of contract without having started the project. The systems that we have are antiquated and we cannot fathom going beyond 2022 with the equipment.”³¹

The CAAZ’s inability to ensure air traffic security directly affects regional security owing to Zimbabwe’s geo-strategic positioning in the region. International and regional flights use Zimbabwe airspace to reach their destinations. Without adequate radar systems in place, Zimbabwe risks losses in revenue as airlines avoid their airspace, and risks being blacklisted by the **International Civil Aviation Organisation (ICAO)** over failure to meet basic requirements.³²

2021 in review, and what to expect in 2022

Moderate economic recovery in 2021 has helped Zimbabwe to rebound from worryingly high inflation levels in 2020. This has largely been underpinned by higher agricultural production (see above), improved capacity utilisation and adequate stabilisation of exchange rates. The government’s previous inability to provide adequate foreign exchange hindered operational efficiency of the foreign exchange auction, resulting in increasing backlogs for companies willing to participate. The receipt of \$961m in **Special Drawdown Rights** funds from the **International Monetary Fund (IMF)** has helped clear the backlog and will help the government to continue providing the necessary foreign exchange funds for local companies. The 2022 national budget plans to continue focusing on Zimbabwe’s sectoral strengths that largely aim to increase necessary domestic stocks while expanding its export capacity.

Despite engaging with Western partners through a variety of bilateral agreements and at the **United Nations (UN) Climate Change Conference of the Parties (COP26)** in **Glasgow (UK)** (see *ARC Briefing Zimbabwe Nov 2021*), President Mnangagwa’s ability to strengthen relations with the West hangs on increasing transparency and promoting democratic principles. Zimbabwe does not appear to be doing enough in this regard, as demonstrated by US and EU disregard for the UN special rapporteur’s report on the effect of sanctions on Zimbabwe and the need to lift such sanctions. Although Zimbabwe’s engagement with the East – particularly China – is solid along economic, political and social lines, there has been a distinct shift in relations. The shift stems from a recognition of the need for greater balance through engagement with Western partners. The government’s Covid-19 vaccination rollout has seen Zimbabwe become a role model not only for the region, but also the continent.

Although 2022 is likely to bring further economic growth for Zimbabwe as the negative effects of Covid-19 subside, the Omicron variant may delay this further into the year. The impact will be felt most by the tourism sector as travel bans prevent international tourists from entering the country – a staple for Zimbabwe’s foreign currency generation. However, Zimbabwe’s strong performance in agriculture, construction, manufacturing and mining will continue to underpin GDP growth, although the government will need to continue focusing on promoting exchange rate and inflation stability. This will require domestic confidence in monetary policy, and if actioned appropriately, will result in increasing international investor confidence as the economy continues to rebound.

The run up to the 2023 election will heighten focus on both Mnangagwa and the ruling **ZANU-PF** in 2022. International attention will be on Zanu-PF and the actions of Zimbabwe’s police and armed forces leading up to and during the election. The reported rift between President Mnangagwa and vice president **Constantino Chiwenga** will become clearer, as potential ZANU-PF factional fighting may hinder electioneering and party cohesiveness. The coherence of opposition party **MDC Alliance** and its various splinter groups will also determine the strategy

³¹ Herald, 2 Dec 2021

³² New Zimbabwe, 3 Dec 2021

and success of the opposition in the run up to the 2023 elections.

Planner

July 2023 (Zimbabwe) – Harmonised elections

Chronology

5 Dec 2021 **Harare (Zimbabwe)** *The Standard*. A ruling party **Zanu-PF** faction loyal to President **Emmerson Mnangagwa** discusses actively pushing for the ouster of vice-president **Constantino Chiwenga** with war veterans being used as pawns in the fresh succession battles in the ruling party;

2 Dec 2021 **Harare (Zimbabwe)** *Herald*. **Zimbabwe** health authorities detect a case of **Omicron coronavirus** variant;

2 Dec 2021 **Harare (Zimbabwe)** *NewDay*. Economist **Gift Mugano** criticises government's special drawing rights disbursement plans, saying the significant amount going to road development is a misplaced priority;

1 Dec 2021 **Harare (Zimbabwe)** *NewDay*. **International Monetary Fund** spokesperson **Gerry Rice** says **Zimbabwe** will not qualify for a special debt relief programme until it pays off its debt to the **World Bank**, which stands at \$1.52 billion;

30 Nov 2021 **Harare (Zimbabwe)** *ZimLive*. President **Emmerson Mnangagwa** announces mandatory 14-day quarantine for all visitors including returning residents, and limits venues to those who are vaccinated with a **Covid-19** vaccine;

28 Nov 2021 **Johannesburg (South Africa)** *News24*. President **Cyril Ramaphosa** condemns travel bans enacted against **South Africa** and its neighbours over new **coronavirus** variant **Omicron**;

26 Nov 2021 **Harare (Zimbabwe)** *The Herald*. Finance minister **Mthuli Ncube** says the national treasury will issue \$100m in government bonds to be listed on the **United States**-dollar denominated **Victoria Falls Stock Exchange** during Q1 2022 as part of deficit financing;

25 Nov 2021 **London (United Kingdom)** *Financial Times*. **United Kingdom** bans direct flights from **South Africa, Botswana, Namibia, Zimbabwe, Lesotho** and **Eswatini**, and the **European Union** looks to follow suit, as a surge in cases of a heavily mutated **coronavirus** variant causes alarm among global health officials;

25 Nov 2021 **Harare (Zimbabwe)** *New Zimbabwe*. Finance minister **Mthuli Ncube** presents the \$927.3 billion **2022 National Budget**, saying next year the economy is projected to grow by 5.5% underpinned by higher output in mining, manufacturing, agriculture, construction and tourism;

25 Nov 2021 **Harare (Zimbabwe)** *Bloomberg*. **Canada**-based gold miner **B2Gold Corp** CEO **Clive Johnson** says his company is interested in acquiring gold assets in **Zimbabwe**;

24 Nov 2021 **Harare (Zimbabwe)** *New Zimbabwe*. **United Kingdom** commonwealth minister **Tariq Mahmood Ahmad** says **Zimbabwe** will only be readmitted into the **Commonwealth** if it stops political persecution and respects the rule of law;

22 Nov 2021 **Harare (Zimbabwe)** *Fin24*. **Zimbabwe Revenue Authority** says **Zimbabwean** companies have until the end of this year to declare sales undertaken in foreign currency or risk rigorous audits and hefty fines;

19 Nov 2021 **Washington (United States)** *Bloomberg*. **United States (US)** secretary of state **Antony Blinken** says the US wants to strengthen its partnerships with **African** countries, which it has “*too many times ... treated as junior partners, or worse, rather than equal ones*”;

19 Nov 2021 **Harare (Zimbabwe)** *Reuters*. A subsidiary of state-owned power company **Zimbabwe Electricity Transmission & Distribution Company** signs a \$110m syndicated loan with continental trade finance bank **Afreximbank**;

19 Nov 2021 **Harare (Zimbabwe)** *Mining*. Zimbabwe’s largest nickel operation, **Bindura Nickel Corp**, plans to list on the **United States** dollar-denominated stock exchange in **Victoria Falls**, as part of efforts to ignite foreign interest in the miner;

19 Nov 2021 **Harare (Zimbabwe)** *Zimbabwe Independent*. Figures from state gold refining company **Fidelity Printers and Refiners**, the country’s only official gold buyer, show gold output for the first 10 months of 2021 stood at 22 tonnes, a significant rise from 16 tonnes registered during the same period last year;

19 Nov 2021 **Harare (Zimbabwe)** *The News Hawks*. Parliamentary Portfolio Committee on Lands recommends that the police and **Zimbabwe Anti-Corruption Commission** investigate the **Grain Millers’ Association of Zimbabwe** and its president **Tafadzwa Musarara** for failing to account for \$28.2m availed by the **Reserve Bank of Zimbabwe** (central bank) for the importation of wheat between 2017 and 2019;

19 Nov 2021 **Harare (Zimbabwe)** *Zimbabwe Independent*. Six business tycoons and one institutional investor controlling shareholdings across **Zimbabwe Stock Exchange**-listed firms file suit at the **High Court** requesting it to overturn fresh directives made by capital markets regulators regarding the operation of central securities depositories;

17 Nov 2021 **Harare (Zimbabwe)** *The Zimbabwe Independent*. Government says the **Covid-19** pandemic is “*under control*” in the country, following several days with few or no reported deaths and few infections from the virus;

16 Nov 2021 **Silicon Valley (United States)** *Bloomberg*. **United States (US)**-based law firm representing some major technology companies, **Wilson Sonsini Goodrich & Rosati**, announces it is expanding to help **African** startups raise funds from the US;

16 Nov 2021 **Harare (Zimbabwe)** *IMF*. **International Monetary Fund** staff conclude **Article IV Mission** to **Zimbabwe**, saying it is “*is precluded from providing financial support to Zimbabwe due to an unsustainable debt and official external arrears*” and noting that the use of the SDR (special drawing rights) allocation “*should not substitute for critical reforms, be spent on priority areas within a medium-term plan, and follow good governance and transparency practices*”;

15 Nov 2021 **London (United Kingdom)** *gov.uk*. **United Kingdom** department for international trade announces that it will host a second edition of the **Africa Investment Conference** on 20 January 2022;

14 Nov 2021 **Harare (Zimbabwe)** *Aljazeera*. President **Emmerson Mnangagwa** writes in **Aljazeera** that **Western** sanctions against Zimbabwe must be lifted for Zimbabwe to tackle climate change;

14 Nov 2021 **Harare (Zimbabwe)** *The Zimbabwe Mail*. Ruling party **Zanu-PF** spokesperson and former information minister **Simon Khaya Moyo** dies aged 76;

13 Nov 2021 **Harare (Zimbabwe)** *New Zimbabwe*. Finance minister **Mthuli Ncube** warns fuel operators getting foreign currency through the **Reserve Bank of Zimbabwe** (central

bank) auction system that they risk losing their licences if they continue rejecting payments in the Zimbabwean Dollar;

12 Nov 2021 **Harare (Zimbabwe)** *The Herald*. The **2022 National Budget** to be tabled in parliament on 25 November;

12 Nov 2021 **Harare (Zimbabwe)** *The Independent Zimbabwe*. **Zimbabwe National Chamber of Commerce** escalates businesses' push for an overhaul of the tax regime, as it warns the government that high fuel import taxes could hold back industries' efforts to compete in the region;

12 Nov 2021 **Harare (Zimbabwe)** *The Independent Zimbabwe*. Civil society group criticises the recently gazetted **Private Voluntary Organisation (PVOs) Amendment Bill**, which states that leaders of NGOs that fund political parties or candidates will face up to a year in prison, claiming government is attempting to silence dissenting voices;

11 Nov 2021 **Harare (Zimbabwe)** *The Herald*. Police and some member of opposition party **MDC-Alliance** dismiss social media reports that MDC-Alliance president **Tendai Biti** was abducted at his home in capital **Harare** on 8 November;

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