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Debates about African urbanization, migration and economic growth: what can we learn from Zimbabwe and Zambia?

Abstract:
There has been much debate about whether patterns of urbanization in sub-Saharan Africa defy the usually accepted links between migration flows and economic geographies. In the 1980s and 1990s African urban economies were weak and increasingly informalised. The livelihoods of the majority of urban households became intensely vulnerable. However the most widely accepted narrative was that rural-urban migration remained strong and rates of urban growth were unaffected, suggesting that African migrants ignored economic signals and that explanations of migrant behaviour must primarily be non-economic. A new angle on this debate has now arisen: whether urbanization in Africa generates economic growth or vice versa. This has been triggered by the much improved GDP growth rates which many African countries have experienced in the 21st century, driven in large part by a commodity boom and increased demand for their natural resources. This paper seeks to contribute to these debates through a detailed analysis of the contrasting experiences of Zimbabwe and Zambia from the 1960s to today. Rates of urbanization waxed and waned in both and were evidently affected by national economic development patterns which have been highly variable – to a significant extent the experience of each country in each decade has been the mirror image of the other. From this it is argued that, as elsewhere in the world, migration flows have been strongly influenced by economic opportunity. The evidence from these countries also supports the view that it is economic development that drives urbanization, and not the other way round.
Introduction

‘A far deeper understanding is needed of what exactly drives aggregate urbanization trends in developing and emerging economies. A question being raised is: in such economies, does urbanization cause growth or is it the other way round?’

This paper describes and analyses trends in urbanization and migration in Zimbabwe and Zambia over the past 50 years in order, first, to contribute to debates about the relationship between economic growth and urbanization in sub-Saharan Africa and, second, to provide insights into trends in urbanization there more broadly. It is in part a response to the central question from the current State of African Cities Report (SoAC) quoted above.

The paper outlines key elements of the current debates about African economic growth and urbanization before moving on to the empirical analysis of urbanization in Zimbabwe and Zambia. These two countries have been chosen because they provide interesting opportunities for comparative analysis. It is hard to think of a similarly alike pairing of countries elsewhere in sub-Saharan Africa. They are in many ways remarkably geographically similar. They are landlocked and they share a border. They experience similar climatic regimes with strongly seasonal and variable climates, and are vulnerable to occasional droughts. Maize is their key staple food product. They were colonised by the British. They have important and longstanding mineral sectors but neither has oil. Their populations are the same size: about 13 million. However, as the paper will demonstrate, despite their similarities, their experiences have differed to an extraordinary extent: in essence they have been mirror images so that when one was urbanizing, the other was not. In neither case has there been a steady linear urbanizing trend.

It is helpful to allay some obvious objections about these countries’ similarity before proceeding further, for there are also important differences between them. Their colonial histories were significantly different, despite both being under British rule. Although
both were ruled by Rhodes’ British South Africa Company from the 1890s to 1923/24 under a royal charter, Northern Rhodesia (Zambia) then became a conventional colony, but Southern Rhodesia (Zimbabwe), with its much larger settler population, chose ‘responsible self-government’ - or rather its white population opted for this. Over the next 40 years this meant that the self-interests of the white electorate of Southern Rhodesia determined government policies, allowing continued land alienation from the indigenous Africa population and drastic urban influx controls, but also the development of manufacturing industry and some excellent economic infrastructure (albeit almost entirely outside of the reserves set aside for the African rural population). In Northern Rhodesia, social and economic developments became more similar to those in other colonies, with British commercial interests to the fore and plenty of racist and segregationist policies, but indigenous landholdings were now better protected. The crucial outcomes of these different trajectories were that Northern Rhodesia became independent Zambia in 1964, in line with a host of other newly independent former European colonies, but the ‘self-governing’ whites of Southern Rhodesia refused to accept the inevitable, and illegally declared their own ‘independence’ from Britain, whilst maintaining (and indeed worsening) racist policies which discriminated against the African majority. This led to a liberation war which eventually brought about Zimbabwe’s independence in 1980. As will be seen, these differences in policy regimes and the timing of independence fed into contrasting urbanization and migration patterns in the 1960s, 1970s and 1980s.

**African urbanization and economic growth: the debates**

During the ‘lost decades’ of the 1980s and 1990s when many sub-Saharan African countries experienced long periods of recession and tragic falls in their people’s welfare, a debate grew up about whether it was puzzling that rates of rural-urban migration and urbanization did not slow. The idea of ‘urbanization without growth’ developed (eg Jamal and Weeks 1993; Fay and Opal 2000). In fact there was accumulating evidence from censuses and surveys that net migration rates to towns and urban growth slowed in many African countries (eg see Becker et al 1994, Ferguson 1999; Africapolis undated;
Beauchemin and Bocquier 2004; Potts 1995, 2005, 2010, 2012a), so the debate was partly based on false premises and the latest SoAC 2014 (UN Habitat 2014) accepts that net migration rates did fall.

Very recent African censuses (eg in Mauritania, Ghana, Zambia and Tanzania) show that growth rates in some towns have now increased again. This has happened alongside very significant improvements in GDP growth. This has fed into a new debate about the relationship between rising urban populations and economic growth in Africa. An important contribution was the 2009 World Development Report which strongly emphasised the positive role of urbanization in economic development, because it countered the usual anti-urban tenor of most analyses of sub-Saharan Africa. It was not, of course, specifically about Africa but it set out the thesis that the region was under-urbanized and would benefit economically from faster urbanization, which has become part of the new debate. There are now a range of economic and urban analyses which assert either explicitly or implicitly that it is the urbanization that is causing the economic growth. For example, the head of UN Habitat, Joan Clos, wrote in the preface to the 2010 State of African Cities report that in Africa, ‘Just as the Asian powerhouses, Africa stands to benefit from the rapid expansion of its cities. Urbanization is jump-starting industrialization’ (Clos, 2010, ii). A frequently cited report on Africa’s fast-growing economies by the Mckinsey Global Institute (2010) argued that ‘[g]lobal businesses cannot afford to ignore the potential….. Africa’s growth acceleration resulted from more than a resource boom……. Long-term growth also will be lifted by ….. Africa’s growing labor force, urbanization, and the related rise of middle-class consumers’ [emphasis added]. The 2012 African Economic Outlook, which focused on youth unemployment, claimed that, ‘the long-term perspective is good…… rapid urbanisation provides opportunities for sector development and job creation’ (Africa Development Bank, 2012, p11). Another, earlier analysis on African urbanization, stated that, ‘most economists agree that urbanization can precipitate economic development in the region’ (Hanson 2007). In 2013 in a presentation on African urbanization Paul Collier argued,
‘Cities are fundamental to the miracle of productivity because [they] permit scale and specialisation…. The more people you can bring together, the more specialisation is possible. And in rough terms, we think that every time you double the size of a settlement, globally, you get an increase in productivity per person of about 6 per cent. …. So, whatever urban middle class romantics about rural areas say to the contrary, dispersed is dumb. …. economic activity takes density.’

(Collier, 2014)

Even if we confine a comparative perspective to sub-Saharan Africa, Collier’s essentialist take on the relationship between city size and economic production is obviously problematic given, for example, the difference between productivity in Johannesburg and Kinshasa. With reference to urban jobs, he further argued that these result ‘from … processes initiated by policies, investments, and decisions of various actors’ but again, that ‘[in] my mind, they are a product of density’.

The influence of this approach to African urbanization is evident in the quote at the start of the paper. The very positive presumptions made about how urbanization will lead to higher productivity, employment and economic growth draw upon the standard toolbox of urban economic geographers – specialization of production and labour, agglomeration economies, economies of scale, backward and forward linkages, industrial clustering, innovation and so on. That these characteristics are facilitated by conditions in dense, large urban settlements has long been established in geographical literature (eg Bourne and Simmons 1978; Lloyd and Dicken 1977; Pacione 1985) and is often the starting point for students of urban economic geography. In recent years these concepts have been revisited with renewed interest in the relationships between urbanization and economic growth (eg Scott and Storper 2013; Spence et al 2008). For example, in their recent review of urban theory and the nature of cities, Scott and Storper (2013: 6) argue that, ‘throughout the course of history, urbanization has been fundamentally engendered by a complex interaction between economic development, divisions of labor, agglomeration, specialization and external commerce’. The potentially positive links are also emphasised by Annez and Buckley (2008: 1) who state that ‘[u]rbanization and growth
go together’. Nonetheless these authors do not suggest that urbanization is, on its own, sufficient to drive economic growth. The links between growth and urbanization are seen as two-way. It is also recognized that positive urban economic developments require public sector planning and infrastructural investments as otherwise ‘disfunctionali­ties would unquestionably undermine the viability of the city, for market logic alone is congenitally incapable of regulating the urban commons in the interests of economic efficiency and social wellbeing’ (Scott and Storper, 2013:8). And Annez and Buckley (200? : 28] note that ‘[a] sound system of public finance for local public goods does not emerge naturally in poor urbanizing countries’ and ‘requires central government support’. This is evidently relevant for African urban economies as infrastructure in most African cities is poor.

More significantly for this debate, a review of available evidence for the relationships between economic growth and urbanization specifically in Africa found it to be very mixed. Four such studies found no link, while three did (Turok and McGranahan 2013). Turok (2013) has also shown that while the relationship between levels of GDP per capita and urbanization levels in 1985 and 2010 for eight Asian countries was extremely positive and unambiguous, this was not true for selected African countries. He concludes that this ‘clearly supports the argument that urbanisation has not been strongly associated with economic development in Africa’ (ibid, 152, 154). However, this may well be because the strong variations in annual GDP per capita change for each African country over that period, with weak or even negative growth in the 1980s and 1990s, and fast growth since 2000, evidently would not be reflected by two data points 25 years apart.

One key factor not much emphasised in these studies is the strong impact of global competition and the constraints of comparative advantage on the nature of economic growth and urban economies in different countries in a liberalized trade environment. Asian cities have strongly outcompeted those in Africa (and indeed many in OECD countries) for manufacturing and the associated jobs. Much of the theorising about the positive economic aspects of cities relates to this sector with Scott and Storper (2013: 5)
stating that it is after the Industrial Revolution that ‘the fundamental relationship between economic development and urbanization becomes especially clear’. Indeed, the SoAC 2014 Report from which the quotation at the beginning of this paper is taken, goes on to note that research by the Asian Development Bank on the correlation between urbanization and GDP growth finds that ‘the strongest direction of causality is probably from industrialization to urbanization, rather than the reverse’. This adds another layer to the debate, because much of sub-Saharan Africa de-industrialized under the impact of trade liberalization at the end of the 20th century and the process has not ended yet for some countries. Turok (2013: 147) notes that, today, protecting infant industries in African cities is likely to ‘run foul of … WTO rules’. Much of Africa’s recent economic growth comes from stronger commodity exports and mining and thus the role of these in urbanization is attracting much interest (ibid; Robbins 2013; Potts 2013a; Bryceson and MacKinnon 2012). Gollin et al (2014: 2), for example, argue that ‘industrialization and resource exports are equally plausible sources of urbanization in the developing world’ as ‘resource rents are disproportionately spent on urban goods and services’ leading to ‘consumption cities’; however, they find these are not as ‘welfare-improving as production cities’.

The remainder of this paper contributes to these debates about trends in African urbanization, migration and economic growth by examining the trajectories of these three factors in Zimbabwe and Zambia from the 1960s. As will be shown, their experience strongly supports the position that urbanization is dependent on economic growth (and not vice versa), both at the national level and in relation to the trajectories of individual settlements.

Urban trends in Zimbabwe and Zambia compared

The following analysis of the past 50 years of census data from Zimbabwe and Zambia starts by looking at the broad national patterns as expressed by changes in urbanization levels. It then moves on to look more closely at individual towns, using a shift analysis
which identifies those which have gained or lost population share relative to the country as a whole during different intercensal periods.

*The national picture: urbanization and counter-urbanization from the 1960s to today*

1960s: At the beginning of the 1960s censuses were held in both Southern and Northern Rhodesia. Their levels of urbanization were close: 18.4% in Southern Rhodesia and 21% in Northern Rhodesia. By fortunate coincidence both countries held another census in 1969 and, as shown in Figure 1, a major gap had emerged in the few intervening years. Southern Rhodesia had actually counter-urbanized slightly during the 1960s, whilst Zambia (as Northern Rhodesia had now become) had urbanized extremely rapidly, adding about a percentage point a year to its urbanization level to reach 29%. ¹

FIGURE 1 ABOUT HERE [Changes in level of urbanization]

The explanations for these opposing trajectories lie in a combination of local and global factors. At the beginning of the 1960s, as explained in the introduction, both countries were still part of the British Empire, but their political situations were very different. From 1953 both were part of the Federation of Rhodesia and Nyasaland, which brought together the two Rhodesias and Nyasaland (today’s Malawi) in an economic and political grouping. However, this had been strongly resisted by the African populations of all three territories who perceived, correctly, that one objective of the Federation for the white settlers was to try to avoid the imposition of elections with universal suffrage leading to independence from Britain and, inevitably, black majority governments. In Northern Rhodesia and Nyasaland it was increasingly clear by the start of the 1960s that

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¹ All the data on urban populations and growth rates cited in the text and used in the figures are derived from the relevant census reports for the respective countries. Data are never taken from sources like the World Bank or UN Habitat as these can be misleading. All urban figures are taken from the report from the census for the year reported and are always cross-checked (eg between national level reports and any regional or provincial reports) to ensure publishing errors are weeded out. All growth rates are independently calculated from raw data. Fortunately both Zimbabwe and Zambia are scrupulous about publishing their census data in a reasonably timely fashion (and now online) and the author has data sets back to the 1960s for Zambia, and earlier for Zimbabwe. A similar analysis to this one would be very much more difficult for many other African countries due to data issues.
this was not going to be possible and the groundwork for eventual elections was being laid. In 1964 both became independent.

For Zambia this meant that a new African government now determined national policies. Laws which had constrained rural-urban migration and family migration were relaxed and major public investment began to be made in health, education and the bureaucracy as well as in industry. Much of this was urban-located. In essence Zambia followed the tenets of modernization theory which was the norm at the time, with a central role for the government and deliberate investment in social infrastructure and industries, protected from foreign competition by tariff barriers. Zambia inherited an economy which was heavily dependent on copper mining and exports. A string of mining towns linked by rail, road and energy infrastructure already existed on the Copperbelt: Ndola, Kitwe, Chingola, Luanshya, Mufulira, Chililabombwe and Kalalushi. By 1963 Kitwe’s population was 123,000, and Ndola’s 93,000, for example. The 1960s was a boom decade for the global economy and the terms of trade for most newly independent African countries were quite favourable, especially since oil prices were very low by contemporary standards. Copper prices were strong, and the private mining companies of the Copperbelt were highly profitable. Zambia’s copper production increased 7.3% annually in the 1960s. These factors combined to create many new urban formal sector jobs, which in turn allowed the development of much informal sector work associated with the multiplier effects of the new consumption power in Zambia’s cities.

The impact of these developments on rural-urban migration was huge. In the six years between 1963 and the next census in 1969 Zambia’s main towns attracted very large numbers of in-migrants, many of whom brought their families with them; female in-migration increased significantly, urban birth rates shot up, and urban sex ratios, previously heavily favouring men, began to even out. The effects of the burgeoning government expenditure were most strongly felt in the capital city, Lusaka, which grew at nearly 14% per year, and therefore more than doubled its population from 121,000 to 262,000. Net in-migration was also strong to the Copperbelt towns. The level of urbanization increased by an astonishing 8%. Most urban residents were in-migrants
rather than urban-born. Significantly, however, long-established practices, which had been encouraged by colonial policies, of maintaining rural links and some rural retirement continued. The lack of viable livelihoods for those not in work, such as the old and disabled, affected these decisions, as well as various cultural influences (see Potts 2010a).

In Southern Rhodesia the situation was very different. An illegal white settler government declared ‘independence’ from Britain in 1965 and proceeded to tighten urban influx controls for Africans (Gargett 1977), seriously constraining rates of net in-migration (Mutambirwa and Potts 1990; Potts 2010). Family migration was discouraged, so sex ratios remained skewed towards men. International sanctions on the illegal government imposed some limitations on economic growth but also, ironically, provided strategic enforced protection from global competition for many productive enterprises in the urban economy. This was a benefit in the short-term for manufacturing (Stoneman, 1982; Riddell 1990) which was already stronger in Rhodesia than almost anywhere else in sub-Saharan Africa due to its encouragement during the years of white settler self-government. The new illegal government also provided strong support for strategic industries, for example renationalizing the iron and steel industry.

The overall outcomes of these policies was that Rhodesia (as it became in 1965) counter-urbanized as already noted. The fall in the urbanization level was small but contrasted very strongly with Zambia’s experience, evidently, and indeed with the upward trends of rural-urban migration and urbanization across independent sub-Saharan Africa in the 1960s. The combined impact on migration and urbanization masks important differentiation between racial groups. There was net in-migration of the already highly urbanized white population and their urban share increased from 78.3% to 79.8% during this intercensal period. They accounted for about one quarter of the total urban population of Salisbury, the capital city, by 1969. However, the urbanized African population fell from 14.5% to 13.9% (Ministry of Finance 1979).
1970s: Zambia’s next census was conducted in 1980 and Zimbabwe’s in 1982, two years first after independence in 1980. Since then both countries have held censuses every ten years, which has by no means been common in sub-Saharan Africa, allowing continued easy comparisons between them. Both countries urbanized strongly during the 1970s: Zambia’s urbanization level increased to 40%, yet again adding a percentage point per year, and Zimbabwe’s rose to 26% (nine percentage points over thirteen years). The urban share of Zambia’s population had almost doubled in eighteen years. Again a mixture of local and global economic and political factors influenced these changes.

At the beginning of the 1970s Zambia’s economy remained strong and the copper sector highly profitable and the rapid in-migration of the 1960s was maintained. However in 1973 the first oil price shock of the decade hit the global economy and the copper price plummeted. Zambian economic growth slowed dramatically. Alongside other non-oil exporting African countries hit by rising import bills and falling export revenues as the global economy slowed, Zambia borrowed on the assumption that this was a temporary shift in its terms of trade. There were also major regional disruptions to cope with. Sanctions on Rhodesia led landlocked Zambia’s transport costs to soar as transit routes to the sea for its bulky copper exports were severely affected. More debt was incurred building a second railway north to the Tanzanian coast which would be unaffected by the unstable situation in the southern African region. Finally, the second oil price shock came in 1979. As global recession set in it became evident that the negative shift in the terms of trade was going to be of a longterm nature and Zambia’s debts were unsupportable. By the end of the 1970s, the economy was reeling, urban incomes were in decline, the copper mines were reducing their workforce, poverty was increasing, and formal employment growth had slowed (Ferguson 1999). The seeds of a dramatic change in Zambia’s urbanization were therefore already germinating by the end of the 1970s.

In Rhodesia, the surge in urbanization occurred because of a shift to rapid net in-migration. Partly this was due to refugees from the liberation war, some of whom settled informally. Efforts were still made to maintain control through housing policies and by far the largest housing project of that decade was built in Chitungwiza, a huge
'dormitory' town for Salisbury located in a nearby African reserve in a last ditch attempt to displace African urban population growth away from 'white' cities. This is functionally part of the capital city and is discussed as such below. Once independence was attained in 1980, all influx controls were dismantled; their enforcement had anyway been waning as political change became increasingly inevitable. Economic migrants who had been pent up in African rural areas by the old laws surged into towns and were sometimes joined by family members, so sex ratios started to normalise, and urban birth rates increased.

1980s: In the 1980s the paths of urbanization in Zimbabwe and Zambia again diverged, as in the 1960s, but now the situations were reversed: Zimbabwe was urbanizing whilst Zambia began to counter-urbanize. The fall in Zambia was small (see Figure 1) but of great significance. Here was the country which was often touted, at the time, as a beacon of modernization in Tropical Africa, with an integrated and complex urban system (compared to most other African countries), but now migration had shifted in net terms from rural-urban, to urban-rural (Potts 2005). Copper prices remained low and production fell by 3.4% per year in the 1980s (Meller and Simpasa 2011). The buying power of Zambia’s exports, already reduced from an index of 100 in 1970 to 38 by 1980, had fallen to 13 by 1986 (Jamal and Weeks, 1993, cited in Ferguson, 1999). Unable to pay its debts, it soon came under the auspices of the international financial institutions which began to force the government to impose austerity measures and structural adjustment programmes, thus shifting the country away from state-led development towards the standard neo-liberal set of economic policies. These waxed and waned in the 1980s as the government of the time (a one-party state) sometimes resisted and backtracked. Nonetheless the rises in urban poverty which had already set in by the late 1970s continued. Riots broke out in towns as food costs rose. The relative attractiveness of livelihoods in urban areas fell below those in some rural areas, as the rural-urban income gap dwindled (Potts 1995). More and more people began to find they could not afford to live in town as their incomes could not cover their costs.

Things were very different in Zimbabwe in the 1980s and its urbanization level rose a
further 4.6%. Having arrived fifteen to twenty years late to ‘independence’, the new African majority government embarked on a state-led modernization path, similar to that practised by newly independent African countries from Senegal to Tanzania. It remained essentially capitalist in its economic character (if socialist in its rhetoric) but the previous white settler governments had been strongly directive and their protectionist policies were maintained. The inherited economy had eventually been weakened by sanctions and the liberation war but was very diverse and integrated by African standards, with iron and steel and textile industries, and strong interlinkages between agricultural and industrial sectors (Stoneman 1981). The government also poured money into health and education, as had other governments when newly independent, and had some remarkable successes in these areas at first. Thus whilst Zambia’s infant mortality rates rose by about a quarter in the 1980s, Zimbabwe’s fell by nearly a half. Urban formal employment growth was sufficient to encourage much net in-migration, including many family members. Minimum wages were introduced and enforced, leading to job losses in agriculture, mining and domestic services, but many mainly urban-based jobs fared reasonably well. Manufacturing employment grew at 2.9% per year from 1980 to 1990, electricity and water 2.6%, finance and distribution at 3.5%, and hotel and catering at 3.6% (Chitiga 2004). By the end of the 1980s non-traditional manufactured exports were growing strongly (Stoneman 1989). Poverty levels in towns were reducing. Family migration and the expected length of stay for migrants in town increased; nonetheless most migrants in Harare (formerly Salisbury) still expected to ‘retire’ to rural areas due to the lack of urban safety nets and many rural-urban links were maintained, increasing household livelihood resilience (Potts 2010a).

1990s: In the 1990s Zambia continued to counter-urbanize and Zimbabwe to urbanize. By 2000 Zambia’s level was 35% and Zimbabwe’s 33.6%, so at this point their levels were again almost the same, as they had been at the beginning of the 1960s. However their trajectories had obviously been very different.

For Zambia the underlying causes were basically ‘more of the same’. The economy was liberalised more consistently, under a new government. Urban labour markets became
highly informal; there were more retrenchments at the copper mines, in the public sector and uncompetitive industries; and urban poverty worsened. Migration data in the 2000 census report showed that during the 1990s net migration rates (per thousand) were +2.8 into rural areas, and –4.7 out of urban areas. The evidence for strengthening circular migration was increasingly being picked up in qualitative surveys as well (e.g. Ferguson 1990; Purbrick 1990).

In Zimbabwe there were quite dramatic shifts in various demographic factors in the 1990s. Fertility levels were falling, and death rates were rising. Emigration became an important influence on population change. The 2002 census reported that the growth of the national population had fallen very significantly from an annual rate of 3.3% in the 1980s to 1.1%. The urbanization level increased by 3%, but this was slower than the rise in the previous decade of 4.6%. Over the decade there was net in-migration to towns but their growth rates were much lower than they were in the 1980s: Harare’s was 75% lower, for example. Furthermore, migration data for the year before the census, and birth and death rate data, indicated that many urban areas, including the largest, were beginning to lose population share by the end of the intercensal period: net migration rates had turned negative (Potts 2008). This fitted the predictions of survey data on migrants to Harare in 1994 and 2001 which found that the propensity to leave the city was increasing sharply (Potts 2010a). The migration changes were linked to very significant economic changes. At the end of 1991 the country embarked on a structural adjustment programme which very swiftly undermined many urban-located productive enterprises previously protected from international competition. The public sector was also cut back. There were mass formal job losses and Zimbabwe’s towns, where informal work had been fairly insignificant for livelihoods compared to most of sub-Saharan

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2 There are evidently other demographic issues at work influencing rural versus urban population change in Zambia but careful analysis of fertility, mortality and HIV/AIDS data has shown that the shifts between the rural and urban population share described here mainly accounted for by migration (see Potts 2006). Fox (2014) has argued that the changes are more due to an ‘urban penalty’ whereby urban mortality outcomes have been worse than rural but this cannot be correct as it was not the case in the 1980s and 1990s. Although it has become so, marginally, for some indices in the 2000s, obviously this cannot explain the earlier patterns, and anyway the country was re-urbanizing by the 2000s so the tragic impact on the urban population has been outweighed by the effects of net in-migration. In any case the net migration data in the censuses are clear on this point.

3 Although there was much political argument about this figure, in fact it fitted with a range of other demographic trends and indices and is regarded as reasonable (see Potts 2008 for a detailed analysis).
Africa, began rapidly to informalise (Mhone 1995). Real urban incomes fell. Rural-urban linkages were strengthening to counter urban vulnerabilities (Mutambirwa and Potts 1990). There were increasingly regular strikes (Dansereau 1997).

Zimbabwe’s urban and migration patterns for this decade were playing out against a backdrop of increasing political turmoil which needs to be briefly outlined as they were of such significance for economic outcomes. There had been slow land reform since 1980 to address the most difficult legacy of its history of white settler rule: extreme inequalities in the division of land between whites and blacks (Kinsey 1999). As rural and urban livelihoods weakened in the 1990s, this issue came sharply to the fore. Pressure from war veterans for better pensions led to a calamitous budget in 1997, when the Zimbabwean dollar collapsed. Threats to expropriate land without compensation began, and donor support to wane. Economic management abandoned any conventional developmental model such as modernization or neo-liberalism, and had slid into crisis management by the end of the 1990s. In 2000 the ruling party, ZANU (PF), lost a referendum and only held on to power at an election through violence. Land expropriation began in earnest, accompanied by violence, and the country stopped paying its debts. It was soon cut off from most international finance except for humanitarian aid. The impact on rural and urban livelihoods was drastic, and is the key explanation for the emigration. This was occurring from both rural and urban areas.

2000s: The next census rounds showed that yet again Zimbabwe and Zambia were experiencing contrasting patterns of urbanization but this time it was Zimbabwe that was counter-urbanizing, and Zambia that was now (re)-urbanizing.

By 2010 Zambia’s urbanization level was back to about where it had been in 1980. The main causes were the re-establishment of some key global economic conditions of the 1960s and early 1970s: high copper prices driven by a strong global economy. This time the main source of demand was the Far East (particularly China) rather than western countries. Zambia’s GDP growth rate soared from about 2003, the mines started to rehire and some new mines opened. In 1978 there had been 62,222 employees in mining
most of whom would have been in the formal sector. By 2004 there were only 19,900 (Matenga, 2010 cited in Evans 2014). However, by 2008 there were 62,082 formal mining employees (Republic of Zambia 2011) and in 2012 this had risen further to 74,254.4

In Zimbabwe economic conditions up to 2008 were nothing short of disastrous, and although there has been some normalization since, the urban economy has remained weak and unstable (Chitiyo and Kibble 2014). By the census in 2012 its urbanization level had fallen 1% to 32.6%. National population growth remained similar to the 1990s averaging 1.2% per year, but the urban population grew at just 0.6% per year, well below the rate of natural increase (discussed later), so net out-migration was occurring to rural Zimbabwe and to other countries. Cut off from international finance the government printed money, leading to some of the highest levels of inflation ever recorded in the world, reaching billions of per cent by the end of 2008 when a degree of normality returned after the Zimbabwean dollar was abandoned. Food security in both rural and urban areas was in crisis for much of the decade. Formal sector pay became almost meaningless in relation to urban living costs for most of the time, since inflation destroyed buying power almost as soon as pay increases were announced. By 2004 the primary inputs by real value into most urban livelihoods were sourced from beyond the city (Potts 2011): a combination of agricultural crops, livestock, and gold panning. A government campaign against urban informality in 2005 made it even harder to live in towns; although informal work gradually restarted (or the cities would truly have collapsed), hundreds of thousands had lost their houses. Emigration continued, providing crucial remittance incomes for many, although many migrants were impermanent and involved in cross border trading, going back and forth between Zimbabwe and South Africa, or Botswana, or even Mozambique and Zambia. The discovery of very significant diamond resources in this decade provided a crucial lifeline for corrupt elites, and fed into many other livelihoods, but had few direct impacts on urbanization.

4 The 2010/11 Zambian income and earning report, using different survey methods, records only 53,326 in this sector all of whom would have been formal workers.
To summarise the paper so far: Zimbabwe and Zambia since the 1960s have had directly contrasting urbanization experiences. Both experienced decades in which they have counter-urbanized. In each decade the urban outcomes have been caused by broad economic trends and influences, as well as some country-specific policies: thus urbanization has followed economic growth except when draconian restrictions on migration have been in place. However the national urbanization data only tell us so much; they mask many variations within the countries’ urban networks. The next sections turn to these patterns which provide further insights into the links between economic patterns and urbanization.

Deconstructing Zimbabwe and Zambia’s urban patterns

Urban shift analysis

A shift analysis of urbanization takes the national growth rates for each intercensal period and compares these with those for individual towns. It shows which towns grew faster or slower than the country’s population overall, and thus which were increasing or losing relative population share. This is a helpful approach, because rapid growth rates in African towns of say, 3% per year (which would double the population in 23 years) are sometimes assumed to mean that urbanization fuelled by net rural-urban migration is occurring, when in reality very little real change is occurring in rural:urban shares simply because the national population is growing at much the same rate. It is a simple approach which is easy to do with available data but is indicative only, since natural increase rates may vary somewhat between towns and of course between rural and urban areas. However natural increase remains higher in African towns than suggested by their fertility rates, which are lower now than in rural areas\(^5\), because towns often have high birth rates as they tend to have a larger proportion of people in their fertile years than rural areas. Also their death rates tend to be lower than rural ones. Growth rates similar to, or even less than, national rates do not mean there has been no in-migration either – it simply means that *net* in-migration has been limited.

\(^5\) There are regular Demographic Health Surveys held in most African countries. These show that in 1994 Zimbabwe urban fertility rates were 3.1 and rural rates were 4.9. In 2011 the rates had changed very little and stood at 3.1 and 4.8. In Zambia in 1992 the urban rate was 4.8 and the rural rate 7.1. These had fallen by 2014 to 3.7 and 6.6.
FIGURES 2, 3 ABOUT HERE

Figures 2 and 3 show the extent to which the ten largest urban areas at the last census in Zimbabwe and Zambia were gaining or losing population share over the past fifty years. Taking Zambia first: the most obvious issue is how the counter-urbanization of the 1980s and 1990s was because urban growth on the Copperbelt fell below the national level; the fall was not spread evenly across urban areas. The towns involved were Ndola, Kitwe, Chingola, Mufulira and Luanshya. Kabwe, another mining town (but not a copper producer) was similarly affected. Also clearly depicted is how the period of net out-migration for most copper towns began in the 1970s, when copper prices fell so sharply. Kabwe, by contrast, continued to grow strongly in that decade. Very significantly, all these mining towns continued losing population share in the 2000s (except Kitwe although its growth was very little faster than Zambia’s), even as the country’s economic growth rate sharply improved and the country overall began to re-urbanize.

On the other hand, as shown, Lusaka has consistently grown at rates above Zambia’s. Its relative growth did fall right back to just 1% faster in the 1990s, when liberalizing economic reforms were at their height; in the same decade the mining towns were losing population share fastest as the shift analysis shows. However the gap increased to +2% from 2000-2010, although the rate of in-migration is less than it was in the 1970s and 1980s.

The experience of the other three Zambian towns in Figure 2 has been variable. Space precludes detailed analysis but it is worth noting that their recent growth rates all exceeded the national growth rate. Chipata’s growth is associated with its role as a transport and trading post on the border with Malawi, and Kasama’s growth in the 1970s was because the, then new, Tazara railway passed through it.
Turning to Zimbabwe (Figure 3), there has also been notable variation in population growth between towns. As shown, only the largest towns (the Harare agglomeration, Bulawayo, Mutare, Gweru and KweKwe) experienced periods when they lost population share in the 1960s and 2000s, causing the counter-urbanization during those decades. In the 1960s influx controls were more vigorously enforced in larger centres. The strong net in-migration for most of the large towns in the 1970s as influx controls dwindled, and again during the positive economic phase of the 1980s is clearly depicted. The shift to lower rates of net in-migration in the 1990s is apparent. Finally, it can be seen that the shift to counter-urbanization in the last intercensal period was caused by very slow growth in the largest towns which lost population share: the Harare agglomeration, Bulawayo, Mutare, Gweru and KweKwe. Harare on its own (ie disaggregated from the agglomeration) grew at only 0.3% per year. Bulawayo’s growth rate was –0.3% so it lost population in absolute, as well as relative terms.

While the shift analysis identifies the towns worst affected in Zimbabwe, in fact the situation in these towns has been even worse than it suggests. A shift analysis, like a census, can only account for internal population change between urban and rural areas, and between towns. Yet many migrants from towns (and rural areas) have been going to other countries, rather than Zimbabwean destinations. My rough estimate of net emigration from 2002 to 2012 is 774,000, based on the census totals and the expected additions from natural increase rates. Since emigrants are not recorded by the census, the internal migration patterns recorded in the census tell only part of the urban economic story. The published data are only for inter-provincial migration, which limits the analysis to Bulawayo and the Harare agglomeration, where the urban populations make

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6 Harare is best analysed in terms of three urban areas within Harare province, which operate functionally as one town since nearly all the employment is in Harare. These are Harare, Epworth (a former informal settlement) and Chitungwiza. Housing shortages in Harare and high housing costs have led also to the development of another associated residential area to the east of Harare Province at Ruwa. Its population in 2012 was 56,678, compared to 22,155 in 2002, making it the fastest growing ‘town’ in the country at 9.8% per year. Nonetheless, even if Ruwa is added on to the Harare agglomeration, it makes little difference to its growth rate and it was still losing population share. The same is true if the so-called Harare Western Suburbs (Zvimba District) are added in, which are adjacent to Harare’s to the west. This area has complex political origins, and is only partly ‘urban’.  

7 The estimate uses an annual growth rate of 1.75%, an average of the natural increase rates recorded in 2002 and 2012, which yields an expected 2012 population of 13,835,210. The recorded population was only 13,061,239. The estimate obviously depends on the growth rate used: a 2.2% rate (the figure for 2011-2012) nearly doubles the deficit to 1,398,170. This would definitely be an overestimate. Much would depend on the timing and speed of the fall of adult death rates as the HIV incidence decreased, and in child mortality rates as the economy normalised after 2008.
up all, or nearly all, of their province’s population. Lifetime migration data, which record
the current residence of people born elsewhere, shows negative shifts in both cities. The
net gain to Harare from people born elsewhere accounted for 22% of its population in
2002 but only 17% in 2012. For Bulawayo the respective figures were 19% and 16%.
Intercensal migration data demonstrate clearly how net in-migration to both cities has
fallen compared to the 1990s (Table 1), when it was already reducing; it also shows how
dominant circular migration has been with much movement in and out (see Potts 2010b).
Both towns nonetheless experienced net gains in population from *internal* migration:
Harare’s population was about 5% higher in 2012 than it would otherwise have been,
equivalent to about 100,000 people; Bulawayo gained about 26,000. However, as the shift
analysis already identified both cities as losing population share, we know that there has
been net out-migration overall so the balance must be accounted for by emigrants. As
with the national population, it is possible to calculate rough ‘city deficits’ using
provincial natural increase data from the censuses (see Table 2). These calculations
suggest net emigration from Harare of about 303,000 and from Bulawayo of 123,000. In
sum, the analysis suggests net out-migration from Harare in the intercensal period of
about 200,000 people, equivalent to about 10% of its 2012 population; and around 100,000
from Bulawayo, 15% of its population. Triangulation between different demographic data
thus provides insights into the depth of the impact of Zimbabwe’s urban economic crisis
on urbanization and migration patterns.

TABLES 1 AND 2 ABOUT HERE

The fact that the four smallest urban centres depicted in Figure 2 gained population share
in the terrible economic condition of the last intercensal period is significant. First, this
points to a relative lack of resilience of urban livelihoods in the larger centres compared
to smaller towns. In other words, the larger the town, the more vulnerable its people have
been during the dramatic economic downturn. The falls in formal sector employment and
real incomes in urban Zimbabwe which began in the 1990s and worsened dramatically in
the 2000s brought about major changes in migrants’ perceptions of the economic
advantages of towns. The lack of economic safety nets in towns was crucial in their
judgements. This was very evident from research in Harare in 2001, when most migrants surveyed felt that their standards of living, compared to their previous place of residence, had either not improved or had actually declined, and most said they planned to leave the city in the short to medium term (Potts 2010). During a real economic crisis, the big problems in the larger centres, relative to smaller towns, are higher costs of living, particularly for housing and transport to work, and the greater difficulty of defraying these by various livelihood adaptations. In smaller towns it is easier to walk to work, planning regulations on informality are less vigorously enforced, and food security is much more easily addressed by urban agriculture within or just beyond the urban boundaries (which are obviously nearer in small towns), or by links to nearby rural areas from which many migrants originate. Not only has this been demonstrated in Zimbabwe by a detailed study of people’s views in the small town of Rusape (Andersson 2002), which had a population of around 30,000 in 2012, but it was also evident from the migrant surveys in Harare as some respondents intended to move to smaller towns for these sorts of reasons (Potts 2010a). Food security was a very serious problem in urban Zimbabwe up until at least 2008; in 2004 a national urban vulnerability assessment found it to be as bad as in the rural areas but almost all international humanitarian food programmes only operated in rural areas.

Conclusions

How do these patterns of urbanization and migration in Zambia and Zimbabwe inform the debates outlined in the introduction on the ‘chicken and egg’ question about economic growth and urbanization in African countries, and the rationality of migrants? First, the waxing and waning of urbanization in both countries, for which the proximate cause is variations in the net rates of in-migration to towns, surely demonstrates beyond any doubt that these processes do not occur ‘in the absence of economic growth’ in Africa. Migration rates go up when employment is being generated but are not sustained in the face of strong negative changes in urban economies, incomes and conditions; they

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8 Rusape’s average growth rate 2000-2012 was 2.9% per year, about two and half times that of the national population.
change in logical ways and according to the basic precepts of standard neo-classical migration theory. Second, both when looking at overall changes in the urban population share, and when boring down into the data and disaggregating by town, most shifts in in-migration rates and urban population growth can be explicitly linked to an economic factor; exceptions are due to specific political influences. In other words, positive (or negative) economic changes which either create (or undermine) livelihoods occur before migration changes. Put another way, if in-migration and the establishment of densely settled, large urban populations were enough to create self-sustaining economic growth, there would have been no ‘waning’ of urbanization levels or of the populations of individual large towns in either country. The same point could be argued about sub-Saharan African countries more generally: why did the periods of very strong urbanization established in the early decades of independence not establish sustained economic growth trends across the continent if urbanization itself triggers economic development?

Some urban geographers might regard the central debate here as a ‘straw man’: an academic position artificially constructed and easily proven wrong for the sake of making an analysis seem more relevant. The post-industrial landscape of the USA and Europe is littered with towns (eg Baltimore, Detroit, Liverpool) which have ‘waned’ as the geography of global economic forces has rendered them relatively uncompetitive: merely being large and dense, facilitating agglomeration economies, was not enough to maintain their economic growth (Beauregard 2009; Haase 2012). Mining towns have always been prone to ups and downs, or even disappearing (‘ghost’ towns), depending on the price of the mineral. However, as the introduction to this paper demonstrated, there really is a conviction amongst some analysts that contemporary urbanization in Africa can self-generate economic growth. There is something of a parallel here with the ideas promoted by Florida (2002) that promoting the growth of certain types of labour (young creative people) in struggling cities can regenerate their economies. The idea of the economic growth following the urban people is similar, although the African debate is much broader brush. However Florida’s policies have been very effectively criticised as ineffectual by Peck (2005).
The earlier debate about African urbanization in the 1980s and 1990s was different from the current one: the issue was not whether urbanization and rapid in-migration could generate urban economic growth but why the obvious weakness of urban economies did not deter rapid in-migration. It has been interesting to watch how one debate somehow segued into the other without much reflection on the fundamentally different understandings of the key ‘factors’ (urbanization, migration, economic production) involved. Misunderstandings of the complexities of migration flows have played some part. Knowing that rural-urban migration is occurring is enough for there to be a presumption, as in the two first SoAC reports, for example, that rapid urbanization is occurring. The points that out-migration back to rural areas or to other countries occurs, that both migration flows vary in logical ways according to the relative strengths of livelihoods, and that net migration can end up being quite small or occasionally negative, are missed. The case studies of Zambia and Zimbabwe exemplify the significance of a broader understanding. Another problematic over-simplification is to assume that if urban net in-migration is at all positive, and there is any net gain in population share of a town or range of towns, even when economic conditions have been trending down, then that disproves that migration flows are affected by economic signals. Lusaka, for example, has always experienced net in-migration. Yet well conducted migration surveys always show that there are some flows for which the proximate causes are non-economic (eg to join family members; attend higher education; obtain medical care), or where there is a desperate need for cash to support family members elsewhere, or where personal (eg divorce, disputes) or structural (eg war) disasters push people to towns. Put differently, small rises in urbanization levels do not prove that there is some sort of new urban ‘model’ whereby migration flows are virtually divorced from a country’s economic geography. When rates of net in-migration, and shifts in the share of national population, are analysed over long periods of time as in the shift analysis conducted for this paper, rather than looking at a particular year or short time period, the underlying role of economic factors becomes clear.
Finally, although the discussion above has focused on economic issues, the cases of both Zambia and Zimbabwe show very clearly the significance of political factors and regional geography for understanding urban trajectories, as well as exogenous economic forces, none of which are much recognized in the debates this paper mainly addresses. The nature and strength of implementation of policies on influx control and land have been fundamental influences in the past and continue to shape urbanization patterns, and both reflect the nature of the state and the significance of white settlers. Zambia’s economic decline in the 1970s was greatly exacerbated by being landlocked and trying to comply with economic sanctions on its neighbour which was also its transit route state. All these factors need to be combined to have a true understanding of the urban narratives at the core of this paper. The migration trajectories depicted are nonetheless clear: they shift as urban economies and labour markets have strengthened or weakened and those shifts are always embedded in broader global forces, from international sanctions on Rhodesia during UDI, to shifts in the terms of trade, to the imposition of neoliberal policy conditions in aid packages and advice, to the rise of China.

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Table 1: Inter-censal Inter-provincial Migration in Zimbabwe 1992-2002 and 2002-2012

<table>
<thead>
<tr>
<th>Province and census date</th>
<th>Census population &gt;10 yrs</th>
<th>As % of population aged &gt;10 years at census</th>
<th>Resident at census and previous census</th>
<th>Intercensal in-migrants</th>
<th>Intercensal out-migrants</th>
<th>Net gain from intercensal migration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harare 2002</td>
<td>1,397,596</td>
<td>75</td>
<td>34</td>
<td>-23</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Harare 2012</td>
<td>1,568,529</td>
<td>67</td>
<td>33</td>
<td>-29</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Bulawayo 2002</td>
<td>514,524</td>
<td>75</td>
<td>30</td>
<td>-24</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Bulawayo 2012</td>
<td>490,881</td>
<td>69</td>
<td>31</td>
<td>-27</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

Source: calculated and compiled from data in 2002 and 2012 census tables on intercensal migration rates; CSO (2004a), ZimStat (n.d.)

Notes: a. to compare populations between one census and the previous one, it is necessary to exclude those under ten years of age at the current census as they had not been born at the previous one; to retain comparability the matrices used to generate inter-censal flows also exclude the under-tens at the earlier census. The Zimbabwean statistical office also excludes from the population used those who reported that their place of enumeration had not been their main place of usual residence during the 12 months before that census.
b. Percentages may not add exactly due to rounding

Table 2: Demographic indices: Zimbabwe and Harare and Bulawayo Provinces

<table>
<thead>
<tr>
<th>Population index</th>
<th>Zimbabwe</th>
<th>Harare province</th>
<th>Bulawayo province</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population 1992 (‘000s)</td>
<td>10,412</td>
<td>1,537</td>
<td>622</td>
</tr>
<tr>
<td>Population 2002 (‘000s)</td>
<td>11,632</td>
<td>1,896</td>
<td>677</td>
</tr>
<tr>
<td>Population 2012 (‘000s)</td>
<td>13,061</td>
<td>2,123</td>
<td>653</td>
</tr>
<tr>
<td>Crude birth rate 2001-02</td>
<td>30.3</td>
<td>30.5</td>
<td>27</td>
</tr>
<tr>
<td>Crude birth rate 2011-12</td>
<td>31.9</td>
<td>33.3</td>
<td>27.3</td>
</tr>
<tr>
<td>Crude death rate 2001-02</td>
<td>17.2</td>
<td>10.6</td>
<td>13.9</td>
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<tr>
<td>Crude death rate 2011-12</td>
<td>10.2</td>
<td>7.7</td>
<td>9.3</td>
</tr>
<tr>
<td>Natural increase 2001-02</td>
<td>1.3</td>
<td>2.0</td>
<td>1.3</td>
</tr>
<tr>
<td>Natural increase 2011-12</td>
<td>2.2</td>
<td>2.6</td>
<td>1.8</td>
</tr>
<tr>
<td>AAGR 1992-2002 %</td>
<td>1.1</td>
<td>2.1</td>
<td>0.8</td>
</tr>
<tr>
<td>AAGR 2002-2012 %</td>
<td>1.2</td>
<td>1.1</td>
<td>-0.3</td>
</tr>
</tbody>
</table>

Source: compiled or calculated from data in CSO (2004), CSO (nd.), ZimStat (n.d)

a. Harare province mainly comprised three separately designated urban areas in 2002: Harare, Chitungwiza and Epworth. The provincial boundaries were extended by 2012 largely for electoral gerrymandering reasons, which increased its population and apparent growth rate; but the annual growth rate between 2002 and 2012 of the original urban conglomeration was 0.7%.
b. Bulawayo province comprises Bulawayo city; the two are synonymous
Figure 1: Changes in level of urbanization in Zambia and Zimbabwe 1960s to 2010/12

Note: Zambia’s last three censuses provide both de facto and de jure data for many population figures, but only de jure figures for individual town populations. For the sake of comparability with later analyses of individual towns in 2000 and 2010, the de jure data are used here. The effect is very small e.g. in 2010 the urbanization level using de facto data was 40.1%. The Zimbabwean data are de facto.

Figure 1: Changes in level of urbanization in Zambia and Zimbabwe 1960s to 2010/12
151x104mm (300 x 300 DPI)
Urban growth rates relative to national population growth for Zambia's ten largest towns 1960s to 2010

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Kasama</td>
<td>0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
</tr>
<tr>
<td>Chipata</td>
<td>0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
</tr>
<tr>
<td>Livingstone</td>
<td>0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
</tr>
<tr>
<td>Luanshya</td>
<td>0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
</tr>
<tr>
<td>Mufulira</td>
<td>0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
</tr>
<tr>
<td>Kabwe</td>
<td>0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
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<tr>
<td>Chingola</td>
<td>0.0</td>
<td>-0.0</td>
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<td>-0.0</td>
<td>-0.0</td>
</tr>
<tr>
<td>Kitwe</td>
<td>0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
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</tr>
<tr>
<td>Ndola</td>
<td>0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
</tr>
<tr>
<td>Lusaka</td>
<td>0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
</tr>
<tr>
<td>Total urban</td>
<td>0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
<td>-0.0</td>
</tr>
</tbody>
</table>
Urban growth rates relative to national population growth for Zimbabwe's ten largest towns 1960s to 2012

% annual average growth above or below national rate