Rapid Labour Force Survey on the Impact of COVID-19 in Egypt

Highlights: **Second Wave February 2021**

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Introduction

This document provides a summary of the key findings of the first wave of rapid labour force surveys conducted between January 14th and February 18th 2021 by ILO and ERF, to monitor the impact of COVID-19 on households, household enterprises, and farmers in Egypt. This is part of a series of panel surveys, which track the evolution of the pandemic on Egypt's labour market. The survey estimates retrospectively a baseline pre-COVID situation for February 2020 and measures key indicators for the week or month preceding the roll-out in February 2021. The survey was conducted by phone following a random digital dialing approach. It targeted mobile owners aged 18-64. A sample of 2,000 interviews has been collected. The sample is weighted to be nationally representative by including in the survey a question on the number of phone numbers within the household and other questions related to households' demographics. The survey methodology and phone call outcomes are presented in more detail in the annex.

The household questionnaire covers demographic and household characteristics, labour market status, education, food security, incomes, social safety nets, attitudes towards risks and social distancing, coping strategies, and mental health. It includes a core module, an individual module, a worker module, a farmer module, a household enterprise module, a women module, and a tracking module. A more detailed presentation of findings will follow this report.

Key Findings

- The share of unemployment in the surveyed population increased by 50 per cent between February 2020 and January 2021. Unemployment has progressed in different directions for persons with different educational backgrounds.
- A decline in unemployment may be observed for individuals with less than basic education, while a sharp increase is observed for those with basic, secondary and tertiary education. The progression of unemployment is likewise quite contrasted across both genders. Unemployment has increased substantially among men (+50 per cent) while remaining stable among women.
- The share of working age persons not in the labour force (i.e. inactive) has declined (-5 per cent). The decrease is more pronounced for men (-19 per cent) than for women (-5 per cent). The pandemic has driven many of those who did not (need to) work to look for work, evidently so as to meet increased financial strain among their households.
- In the last 60 days prior to the survey, 26 per cent of wage employees experienced temporary layoffs from their jobs, and 9 per cent were permanently laid off because of COVID-19 or related restrictions.
- Workers in accommodation and food were by far the most affected by working hours and wage reductions. 31 per cent of workers reported a decrease in working hours, and 30 per cent saw their wages reduced. Workers in manufacturing, transportation, and retail trade also reported significant drops in wages.
- Only 2 per cent of businesses in our sample have reportedly closed permanently since the break out of the pandemic; but 60 per cent of businesses report having had to temporarily close or reduce their working hours. Around 23 per cent of businesses reported they had to lay-off some staff. Only 31 per cent of all businesses said they had applied for or are currently receiving support[1] from the Government. While a range of other measures is called for, lending programmes are the most commonly used and required form of business support.
- Three-quarters of the businesses surveyed reported a decrease in revenues; the average revenue drop reaches 50 per cent during the two months preceding the survey compared to the same period last year
- Around two-fifths (41 per cent) of surveyed households reported decreased incomes since February 2020. Incomes decreased by more than 25 per cent among 22 per cent of households.
- More than two-fifths of households reported having had to reduce their food purchase given price increases (42 per cent) or decreased incomes (45 per cent). Using savings and getting help from relatives and friends in-country were the main coping strategies used by households in the face of COVID-19.
- Only 20 per cent of wage employees reported having been able to work from home.

The Covid-19 pandemic in Egypt

Egypt was among the first developing countries to detect a COVID-19 case, in February 2020 (**Figure 1**). Unlike what was observed in Europe and other regions, the pandemic remained subdued throughout the spring. It was only by early June that Egypt reached the 1000 detected daily cases mark. Egypt implemented some lockdown measures in March, including suspending international air travel, imposing a nighttime curfew, closing places of worship, forbidding large gatherings, and encouraging civil servants to work from home[1]. The daily count of COVID-19 cases receded until November, when a second wave of the pandemic surged. Overall and to date the pandemic in Egypt has not reached levels of contagion or prevalence as seen in highly-affected countries in the rest of the word. Officially, reported daily cases have not reached the 2000 mark, in a country of over 100 million inhabitants, and reports from medical facilities have not signaled significant strains on their capacities. Egypt has not adopted so far very stringent lockdown measures and as a result the country has not witnessed the drop in GDP growth that is being witnessed in other, including North African countries. Real economic growth is estimated to have declined (only) from 5.6 per cent in 2019 to 3.5 per cent in 2020[2].

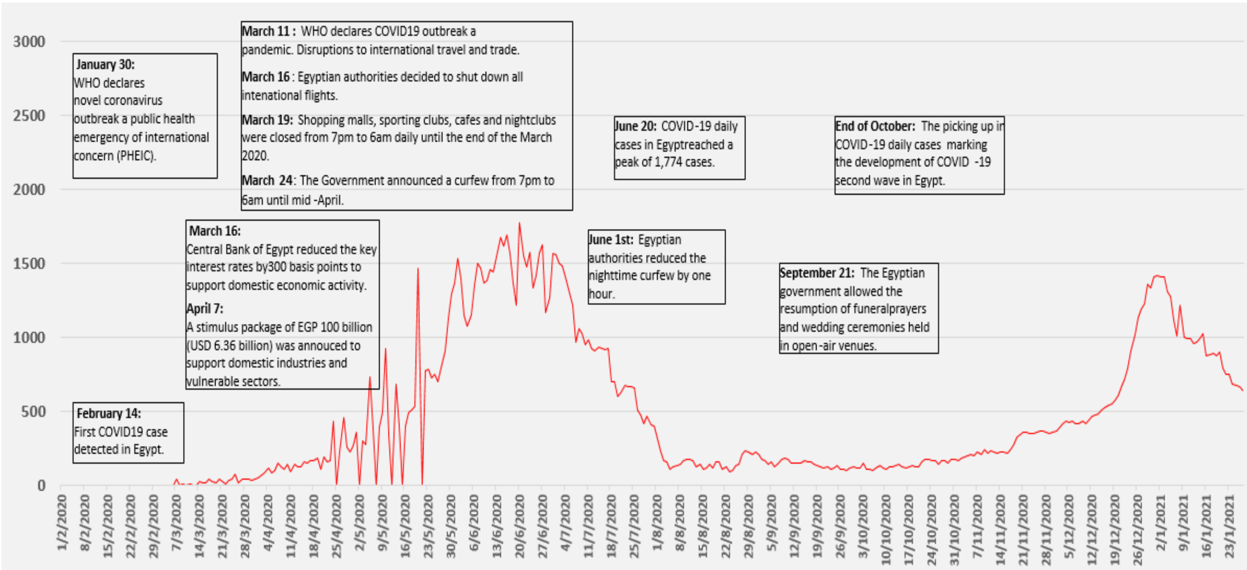
On the socio-economic front, a COVID-19 emergency fund amounting to USD 6.13 billion (EGP 100 billion, equivalent to 1.8 per cent of GDP) has been established. The fund focuses on upgrades to health facilities and emergency economic support to most affected sectors. Other fiscal measures included increasing pensions by 14 per cent, expanding the coverage of targeted cash transfer programs (Takaful and Karama), and the disbursement of a 500EGP grant to unemployed “irregular” workers over a period of 3 months (for an envelope of 3 billion EGP). A Corona tax of 1 per cent on all public and private sector salaries and 0.5 per cent on state pensions has been introduced in order to meet part of this expenditure increase.

On the monetary side, the Central Bank of Egypt (CBE) lowered its key interest rate by 300 basis points in March 2020 and reduced the preferential interest rate from 10 per cent to 8 per cent on loans to tourism, industry, agriculture, and construction sectors, as well as for housing for low-income and middle-class families. Moreover, the CBE approved an EGP 100 billion guarantee to cover lending at preferential rates to the manufacturing, agriculture, and contracting loans. Short-term loans of up to a year were made available for small projects harmed by COVID-19, especially in the industrial and labour-intensive sectors, to secure the necessary liquidity for operational expenses until the end of the crisis.

[1] IMF. 2021. “Policy Responses to COVID-19, Policy Tracker Database.” February.

[2] IMF. 2020. “Egypt: First review under the stand-by arrangement and monetary policy consultation.” December.

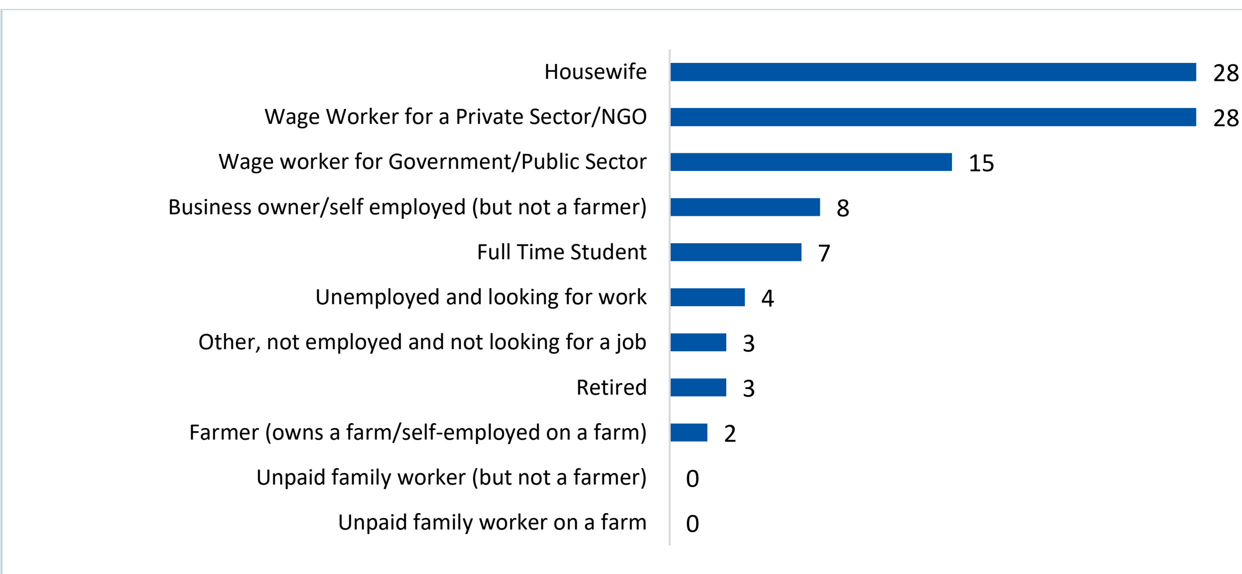
Figure 1: COVID-19 case trends in Egypt and government response



Source: *Constructed by authors using the WHO COVID-19 Database.*

Figure 2 Illustrates the distribution of Egyptian participants in the ILO/ERF COVID-19 survey, with respect to their job activity in February 2020.

Figure 2: Percentage distribution of respondents, by main job/activity, as of February 2020

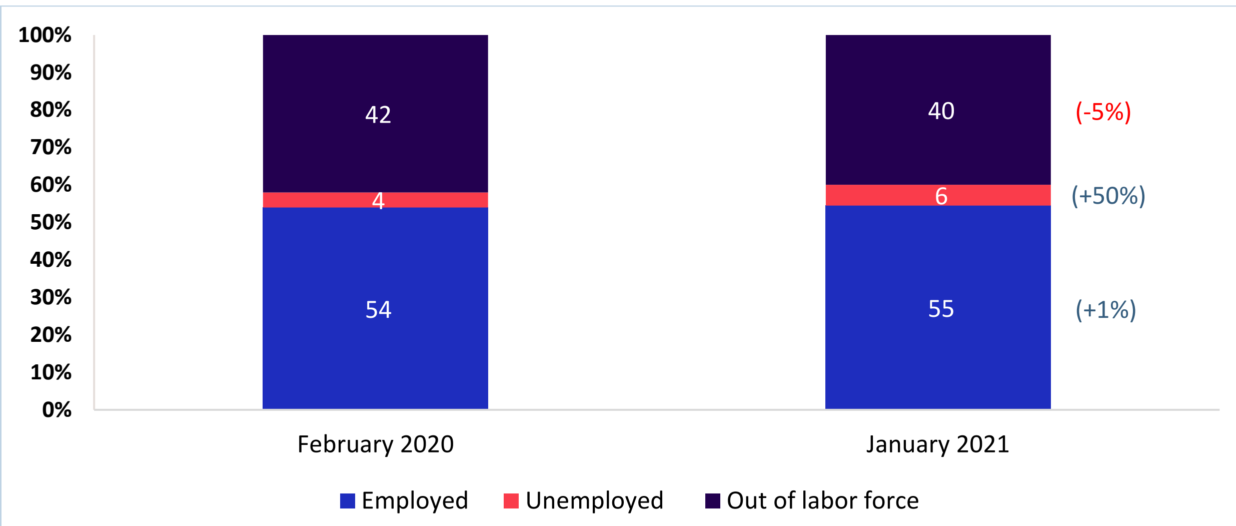


Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

1. Employment and unemployment

The share of unemployment in the surveyed population rose from 4 per cent to 6 per cent between February 2020 and January 2021 (**Figure 3**)[3]. Unemployment has progressed in different directions for persons with different educational backgrounds. A decline in unemployment may be observed for individuals with less than basic education, while a sharp increase is observed for those with basic, secondary and tertiary education (**Figure 4**). The progression of unemployment is likewise quite contrasted across both genders. Unemployment has increased substantially among men (+50 per cent) while remaining stable among women **(Figure 5).** The share of working age persons not in the labour force (i.e. inactive) appears to have declined (-5 per cent). The decrease is more pronounced for men (-19 per cent) than for women (-5 per cent). The pandemic has driven many of those who did not (need to) work to look for work, evidently so as to meet increased financial strain among their households.

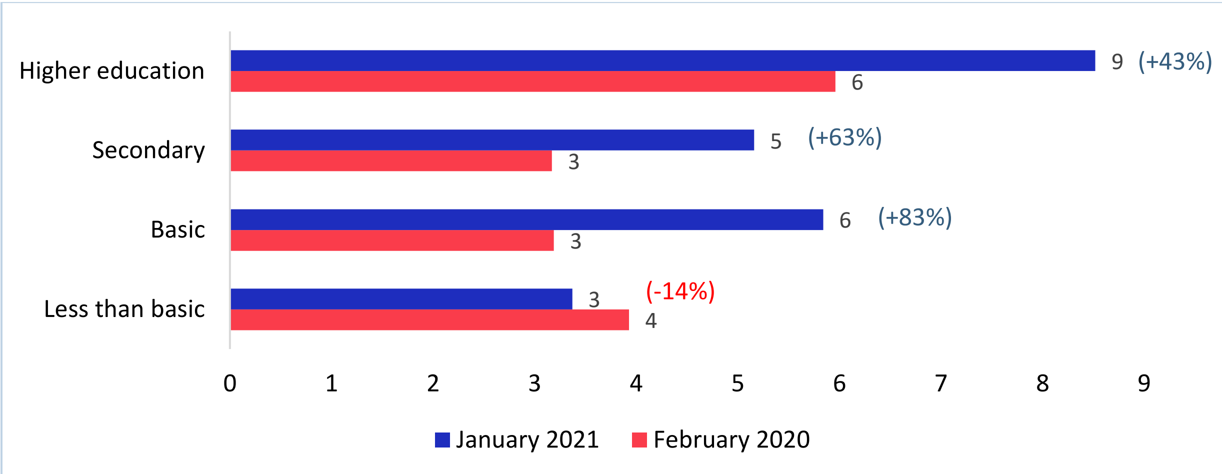
Figure 3: Percentage change in labour force distribution, February 2020–January 2021



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor*

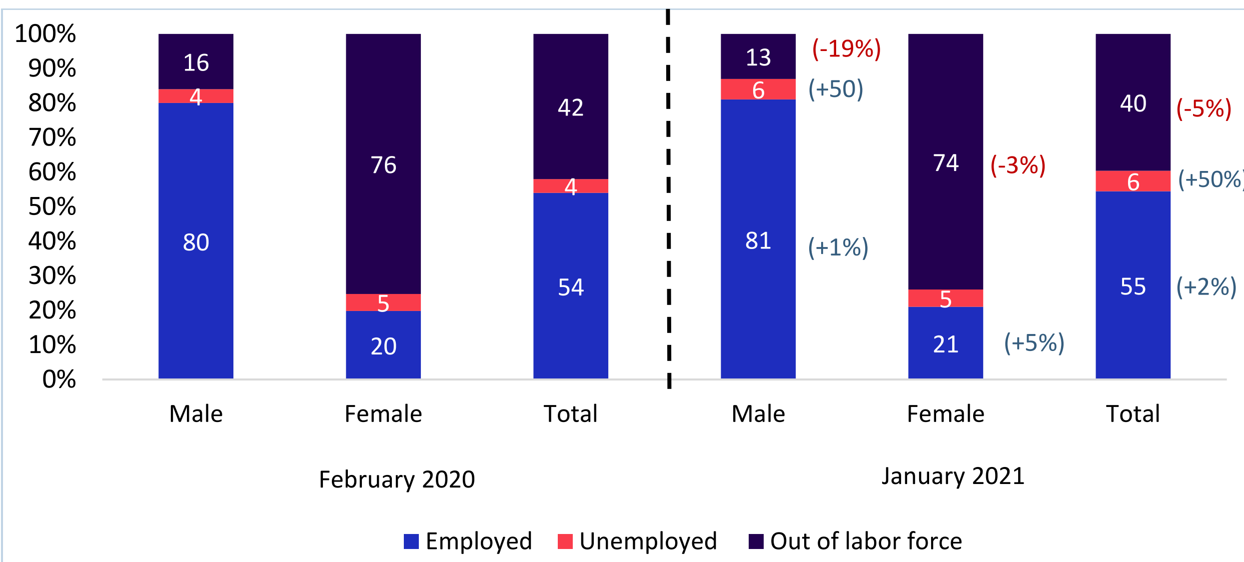
[3] For the distribution of the working age population by employment status, the survey uses a one month reference period for its retrospective measure (i.e. for February 2020) and a one month reference period before February 2021 (i.e. January 2021). To measure the unemployment rate (Fig.6), the reference period is the week before the survey direct question about willingness to work and job search is used.

Figure 4: Percentage change in unemployment, by educational attainment, February 2020–January 2021



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

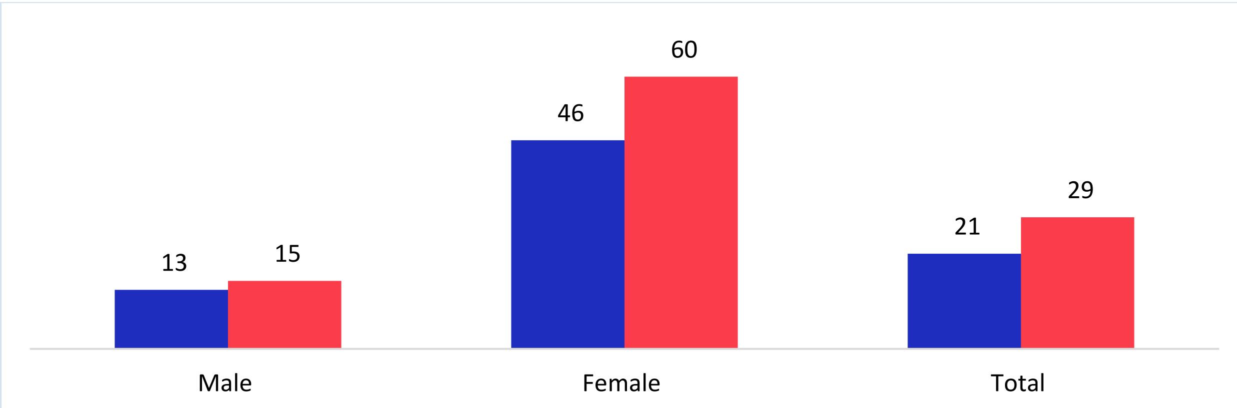
Figure 5: Percentage change in labour market status, by sex, February–October 2020



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Two measures of the unemployment rate using the week prior to the survey as reference period are presented in **Figure 6**. The first measure is based on the standard international definition of unemployment, the other includes among the unemployed also those who did not actively seek employment in the reference period. 29 per cent of working age individuals available and willing to work qualify as being unemployed under this wider definition**.** The difference between both measures is considerably wider among women; 46 per cent are unemployed under the standard definition while 60 per cent can be considered unemployed in the wider measure.

Figure 6: Unemployment rates by sex in February 2021*, standard definition (left) and including those not actively searching (right), %

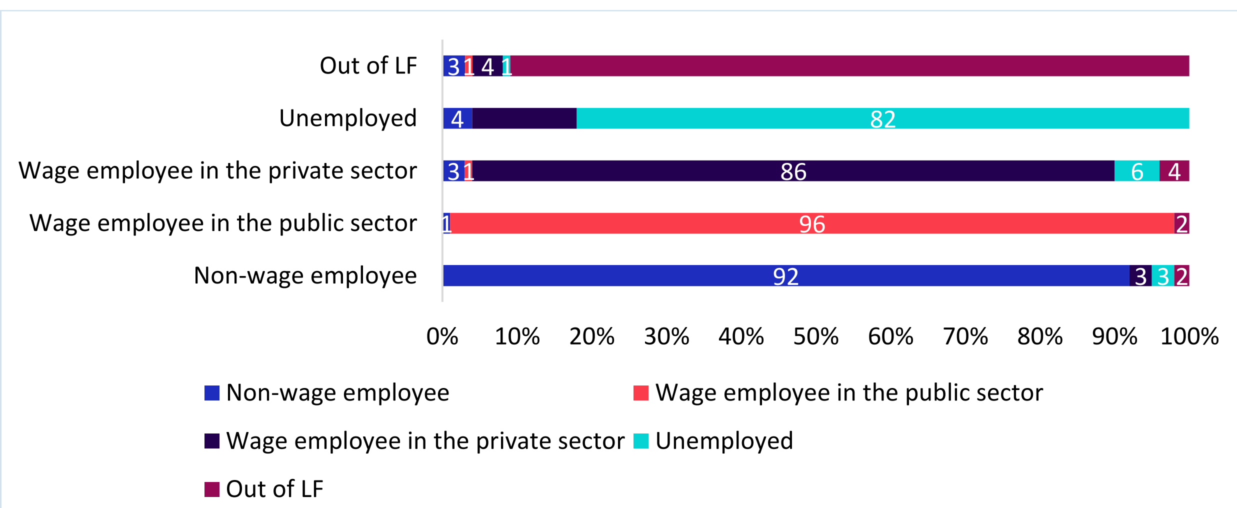


Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Note: Measured for the week prior the survey.

Low volumes of transfers between inactivity, unemployment and different forms of employment have been observed over the past year. 82 per cent of the unemployed in February 2020 were also found in unemployment by January 2021. Most of those who found work did so in private sector wage work, with only very few becoming self-employed. Around 6 per cent of the wage employees in the private sector in February 2020 became unemployed in January 2021, compared to none of the wage employees in the public sector **(Figure 7).** In addition, 4 per cent of wage employees in the private sector in February 2020 were inactive in January 2021 (vs. 2 per cent for wage employees in the public sector).

Figure 7: Labour market transitions, February 2020–January 2021 (Situation of working-age individuals in October as per their situation in February)

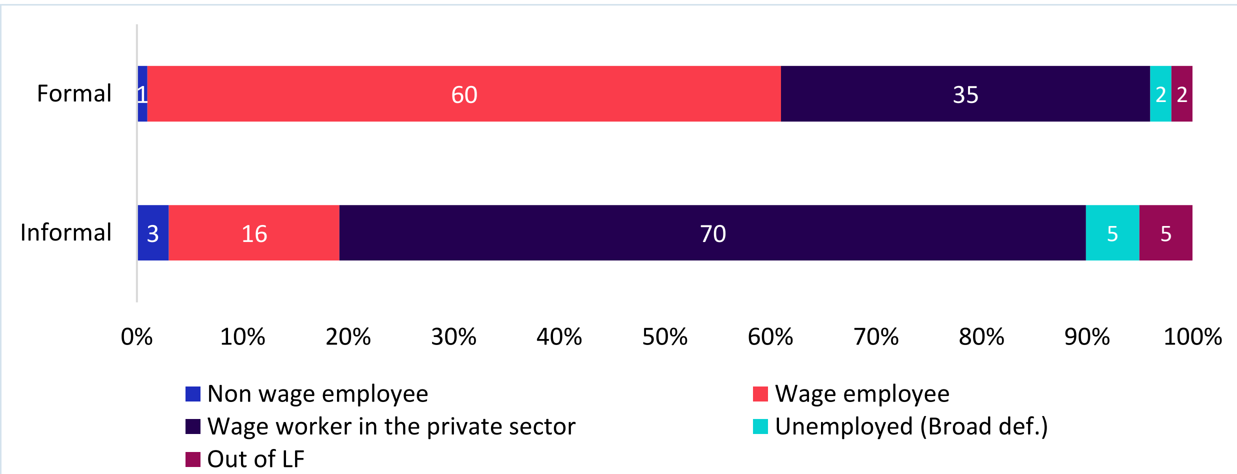


Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Note: Non-waged workers include the self-employed on a farm (22 per cent), employers (72 per cent), and unpaid family workers (6 per cent) in February 2020.

Informal wage employees were more likely to become unemployed or drop out of the labour market than formal workers. 10 per cent of those informally employed in February 2020 were unemployed or inactive in January 2021, as compared to 4 per cent for formal sector workers **(Figure 8).**

Figure 8: Labour market transitions, of formal and informal wage employees [4], February 2020–January 2021 (Situation of working-age individuals in January 2021 as per their situation in February 2020)

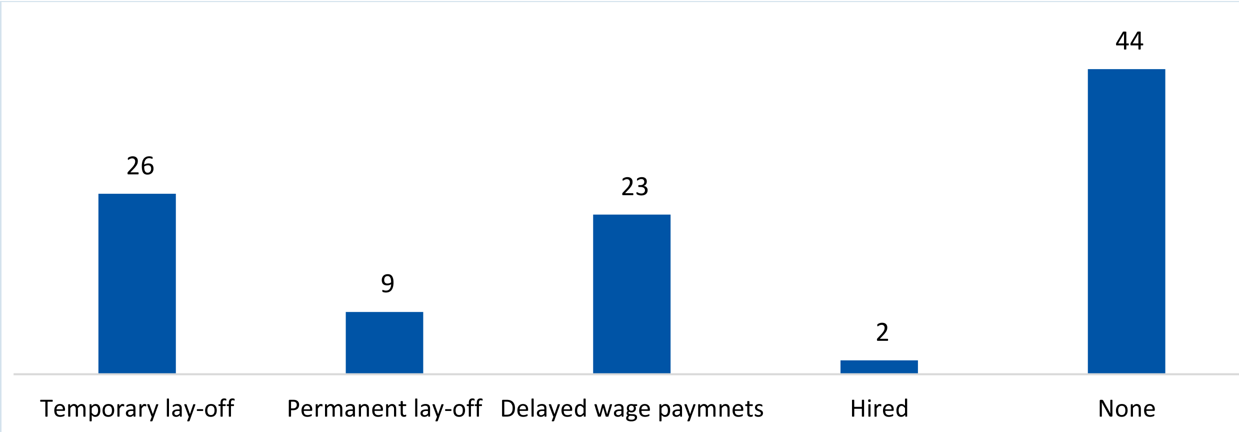


Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Over half of the wage employees experienced either a permanent lay off (9 per cent), temporary lay-off (26 per cent) or delayed payment of their wages (23 per cent), over the two months preceding the survey **(Figure 9).**

4 Formality is defined as benefiting from social insurance coverage. 34 per cent of the total wage employees were in the government sector as of February 2020, where 70 per cent of them were formal employees; compared to 24 per cent of the wage employees in the private sector (66 per cent).

Figure 9: In the last 60 days, have you experienced any of the following because of COVID-19 or related restrictions? (%)

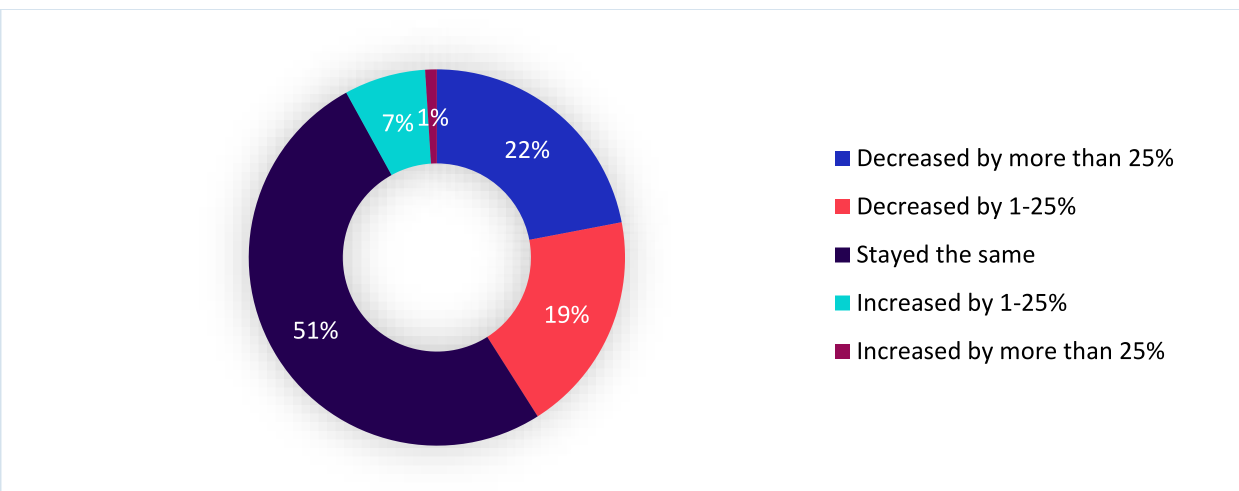


Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*
Note: Multiple answers are allowed.

2. Wages and income

Around 41 per cent of the surveyed respondents reported a decrease in their household income since February 2020. 22 per cent of the surveyed households lost more than 25 per cent of their incomes (**Figure 10**).

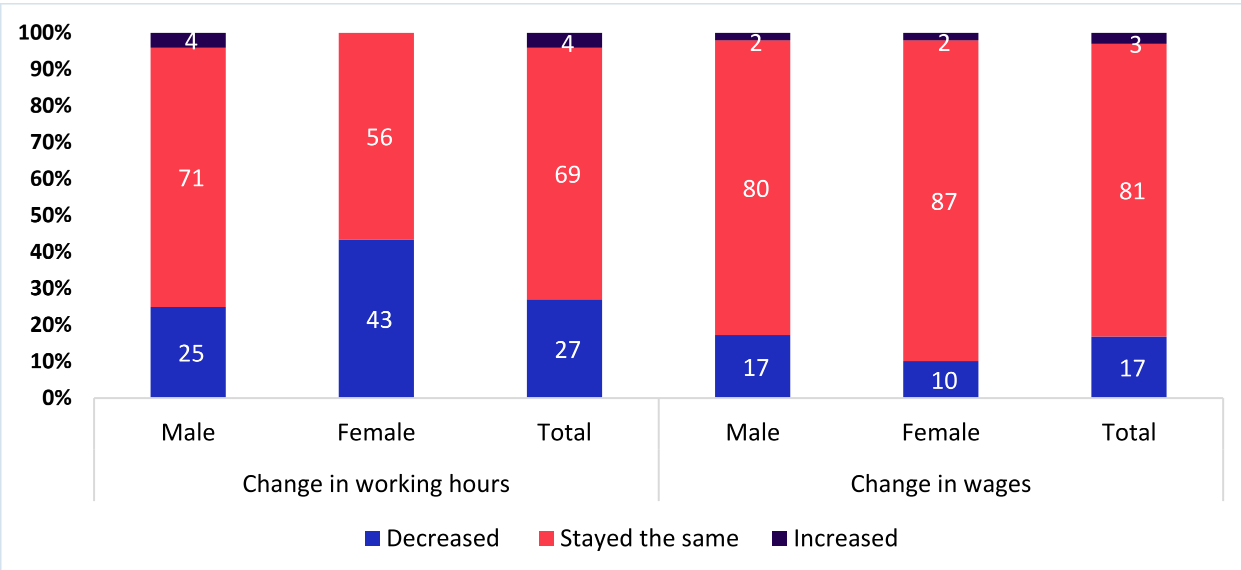
Figure 10: Households' total monthly income change, compared to February 2020



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Female waged employees were more affected by reductions in working hours in the 60 days preceding the survey. More than two-fifths of the female wage employees saw their working hours reduced, compared to one-quarter of the male wage employees[5]. On the contrary, male wage employees were more affected by wage decrease where 17 per cent of the males faced wage decline compared to 10 per cent of the females **(Figure 11).** Wage employees with higher education were at the same time the most affected group by the decrease in working hours and the least affected group by wage reductions **(Figure 12).**

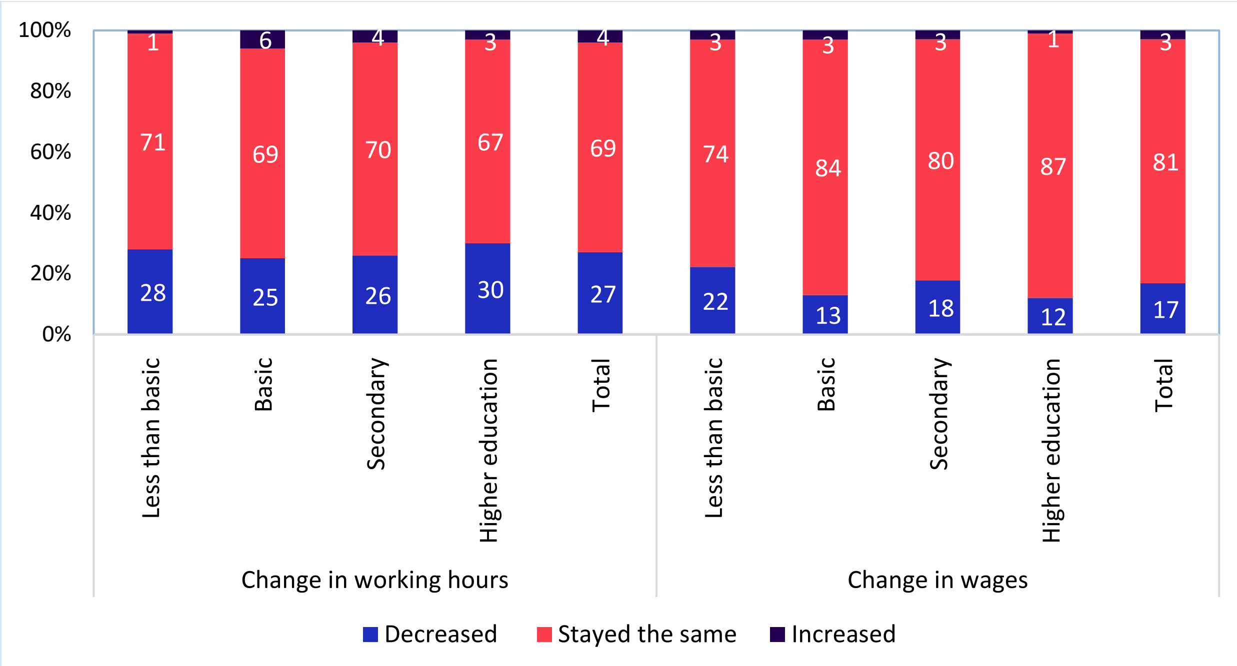
Figure 11: Changes in wages and working hours in the 60 days preceding the survey, by sex



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

[5] Around two thirds of the female wage employees were working in the government sector in February 2020 compared to 28 per cent of the male wage employees.

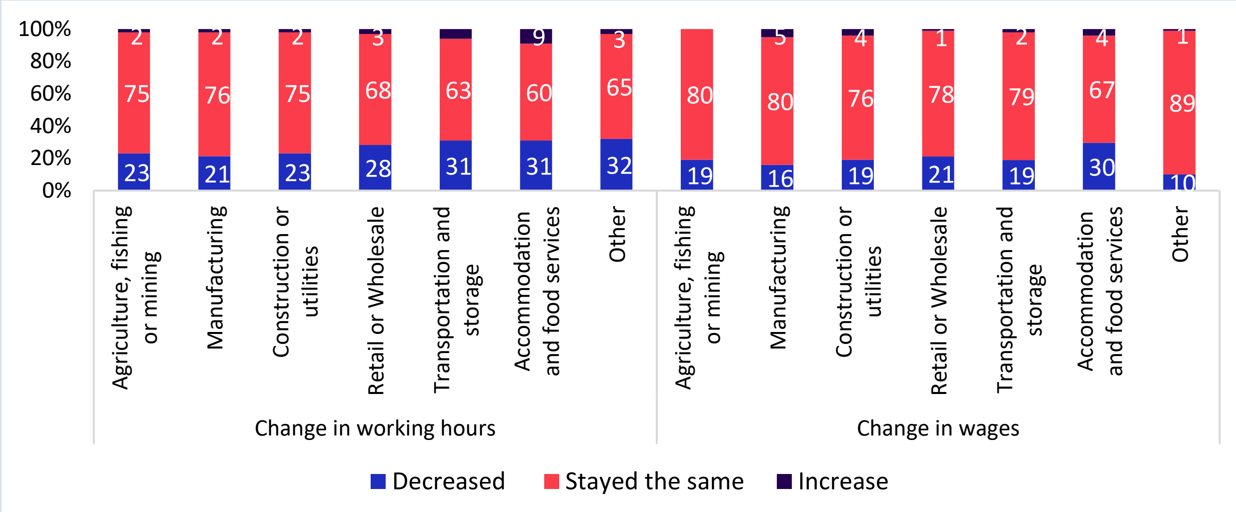
Figure 12: Changes in wages and working hours in the 60 days preceding the survey, by educational attainment



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Accommodation and food services was the sector most affected by working hours and wage reductions. 31 per cent of wage employees reported a decrease in working hours, and 30 per cent saw their wages reduced **(Figure 13).** However, in terms of wage reduction magnitude, the construction or utilities sector and the agriculture sector witnessed the highest average decrease in nominal wages recording 12 per cent and 8 per cent; respectively **(Figure 16).**

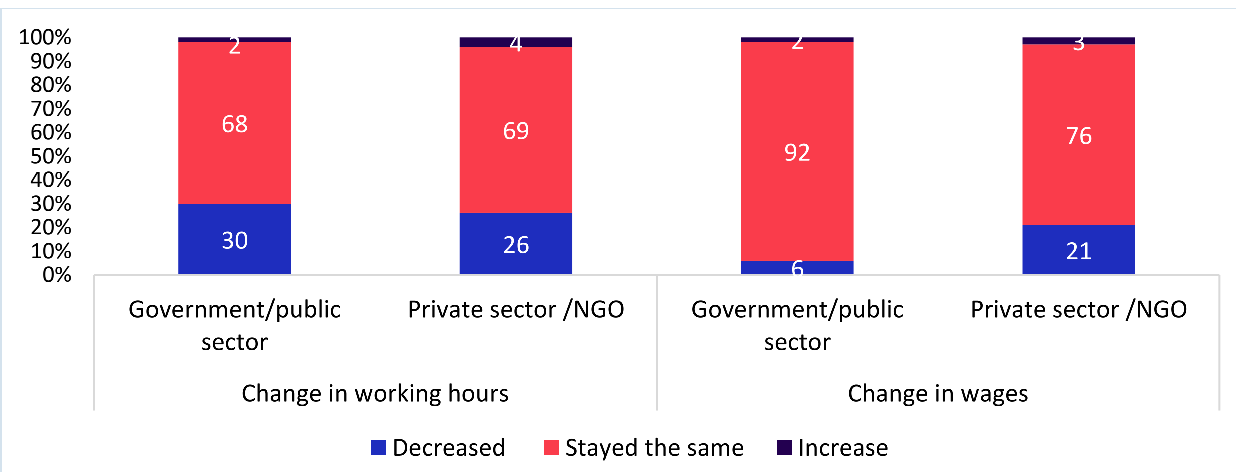
Figure 13: Changes in wages and working hours in the 60 days preceding the survey, by economic activity of February 2020



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

In the public sector, 30 per cent of wage employees reported a decrease in working hours **(Figure 14),** a share only slightly larger than the one observed in the private sector (26 per cent). In the private sector however, wage employees were more likely to experience a reduction in wage than in the public sector (21 per cent vs 6 per cent).

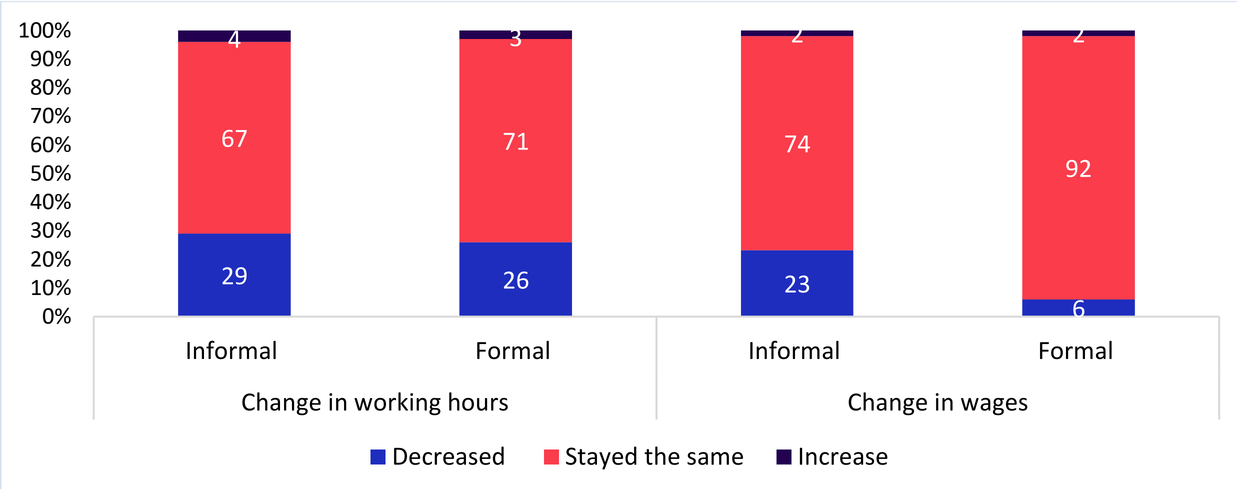
Figure 14: Changes in wages and working hours in the 60 days preceding the survey, by sector type of February 2020



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

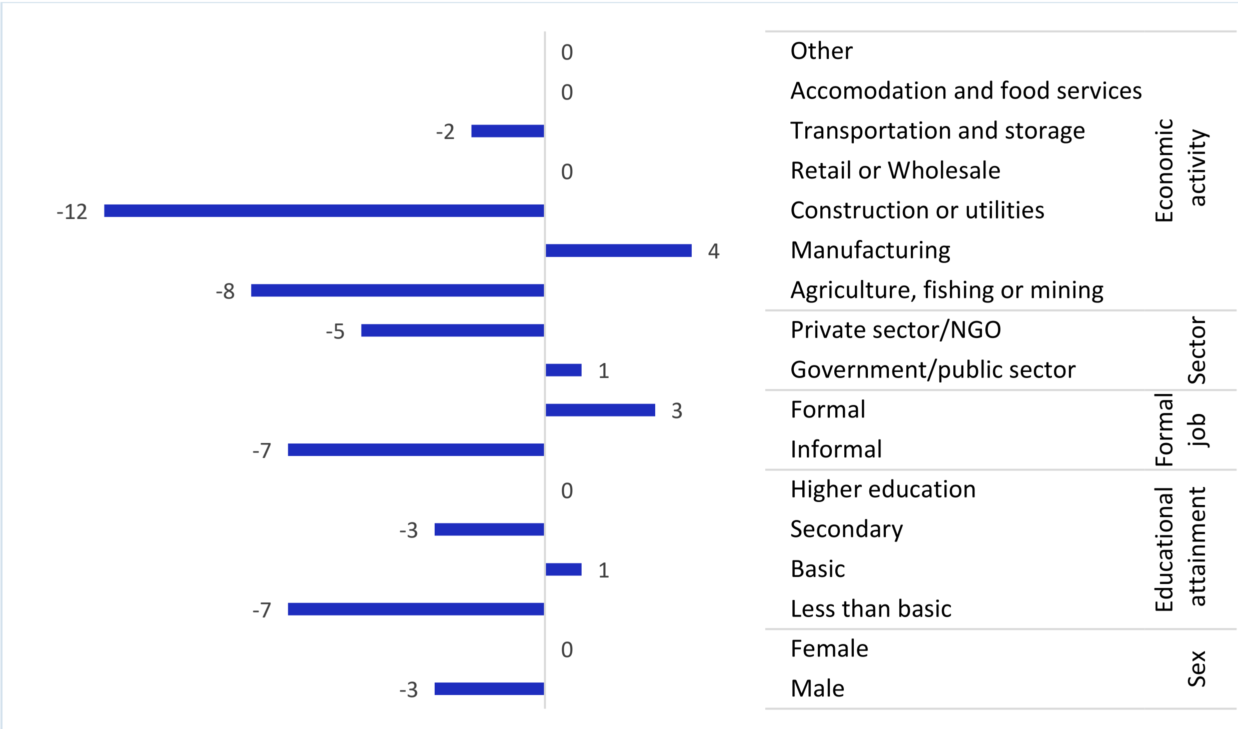
Informal workers were less protected against the COVID-19 repercussions. One in four informal wage employees experienced a decrease in wage over the 60 days preceding the survey, and one in three had a reduction in working hours. In contrast, only 6 per cent of wage employees in the formal sector reported a decrease in wages, while 26 per cent had a decline in working hours. In addition, nominal wages declined on average by 7 per cent in the informal sector, whereas they increased by 3 per cent in the formal sector (**Figure 15, Figure 16**).

Figure 15: Changes in wages and working hours in the 60 days preceding the survey, by job formality of February 2020



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Figure 16: Average percentage change in nominal wages by sex, educational attainment, formality, sector type, and economic activity between February 2020 – January 2021 (%)[6]



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor*

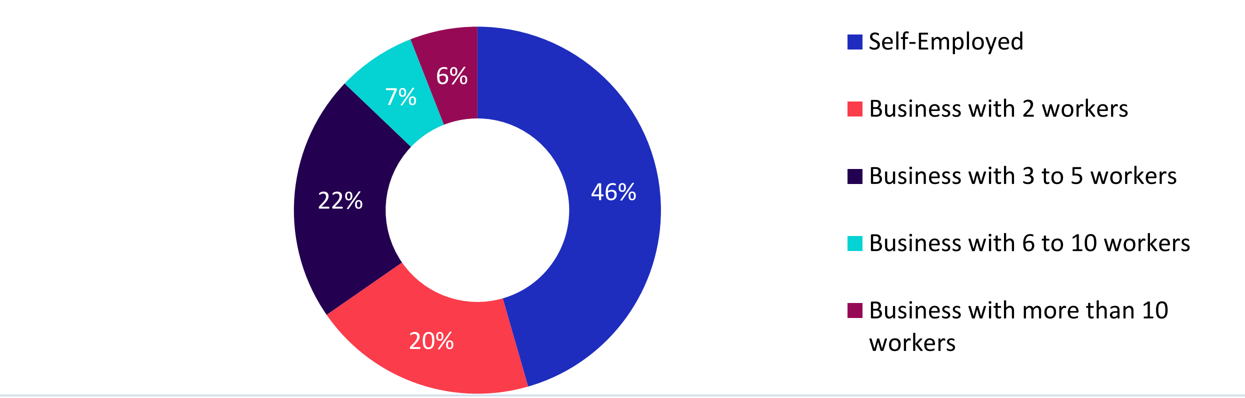
Note: Changes in wages are calculated using the reported wages in February 2020 and January 2021, after excluding the highest 1 per cent. Almost 13 per cent of wage employees didn't report their wages for February 2020 and 11 per cent of wage workers didn't report their wages for January 2021.

[6] Inflation rate in February 2021 compared to February 2020 is 4.9 per cent. Source : https://www.capmas.gov.eg/Pages/IndicatorsPage.aspx?Ind_id=2542

3. Entrepreneurs and small businesses

Our sample of surveyed businesses[7] includes 46 per cent of self-employed individuals, and 42 per cent of micro-enterprises employing 2 to 5 employees (**Figure 17**).

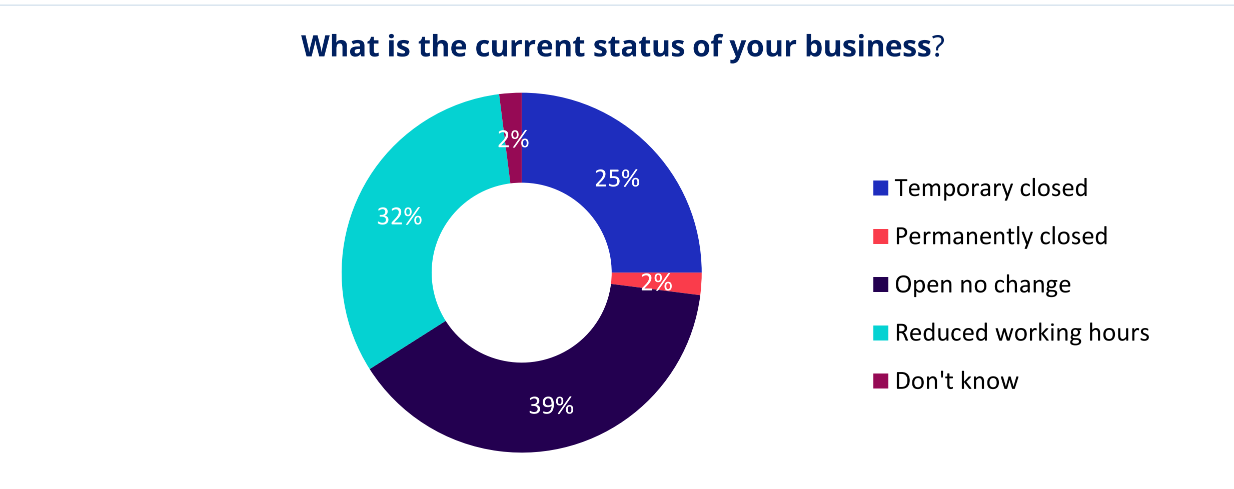
Figure 17: Percentage distribution of enterprises, by number of workers in February 2020



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Only 2 per cent of enterprises that were in business in February 2020 have permanently ceased activity, but 25 per cent have suspended their operations and 32 per cent have reduced their working hours. Only about 40 per cent of businesses reported being able to operate without significant changes in levels of activity **(Figure 18).**

Figure 18: Percentage distribution of enterprises' current status

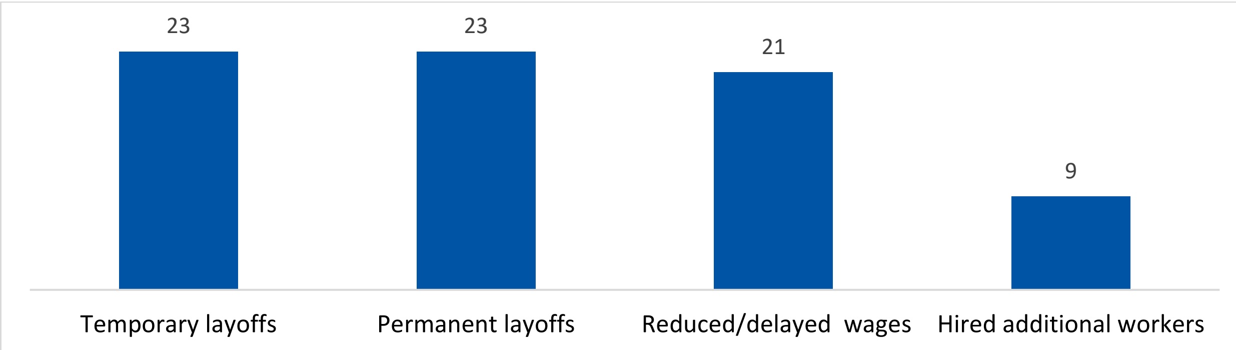


Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

[7] Individuals in the household surveys that reported themselves as self-employed or employers.

Around 23 per cent of employers or enterprises surveyed said they had to lay-off workers and 21 per cent said they had reduced or delayed wage payments (**Figure 19**).

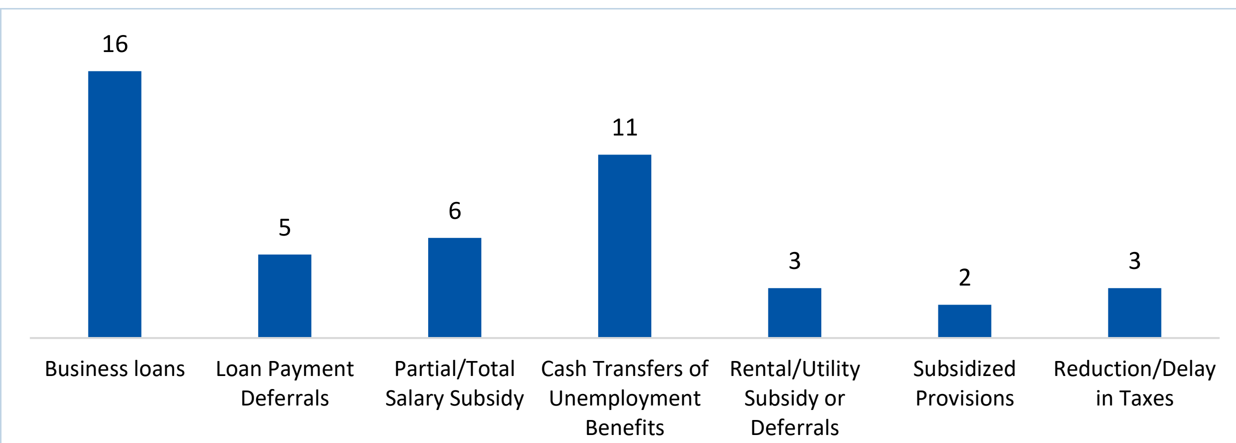
Figure 19: Reported changes due to COVID-19 outbreak and related restrictions (%)



Source: Constructed by authors using the ILO/ERF COVID-19 Monitor.
Note: Changes reported only for employers.

Only 31 per cent of all businesses said they had applied for or are currently receiving support[8] from the Government. While a range of other measures is called for, lending programmes are the most commonly used and required form of business support **(Figure 20, Figure 21)**.

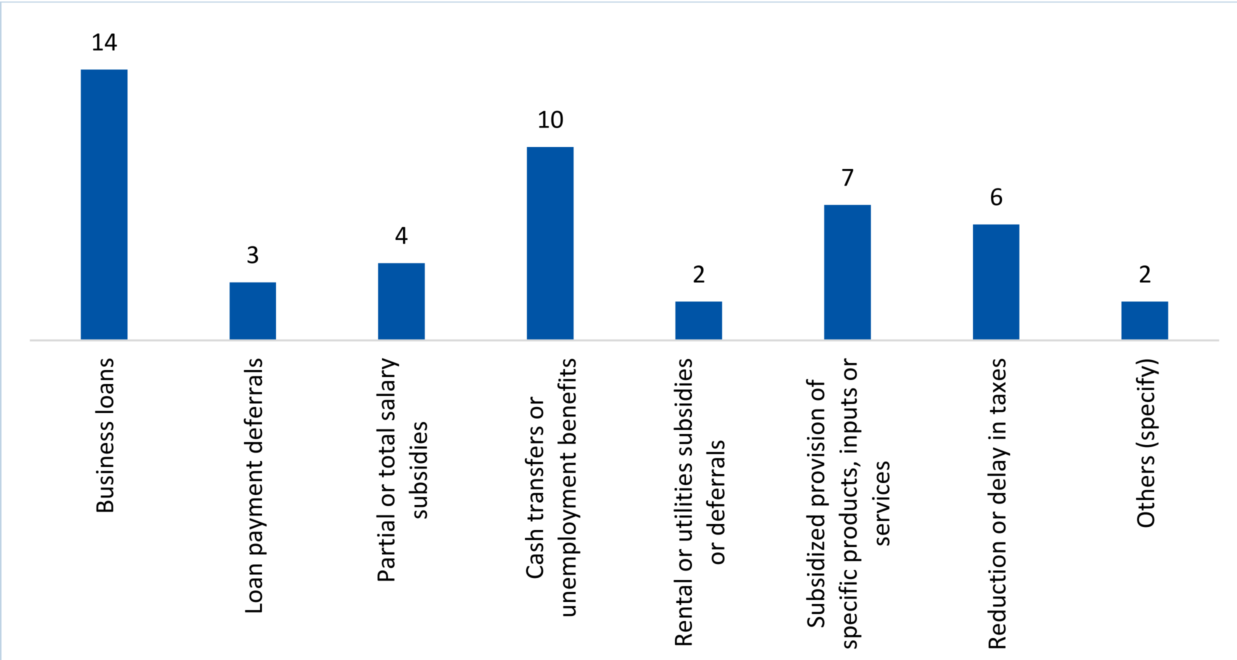
Figure 20: Percentage of employers or business-owners who applied for or currently receive any government support



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

[8] Multiple answers are allowed.

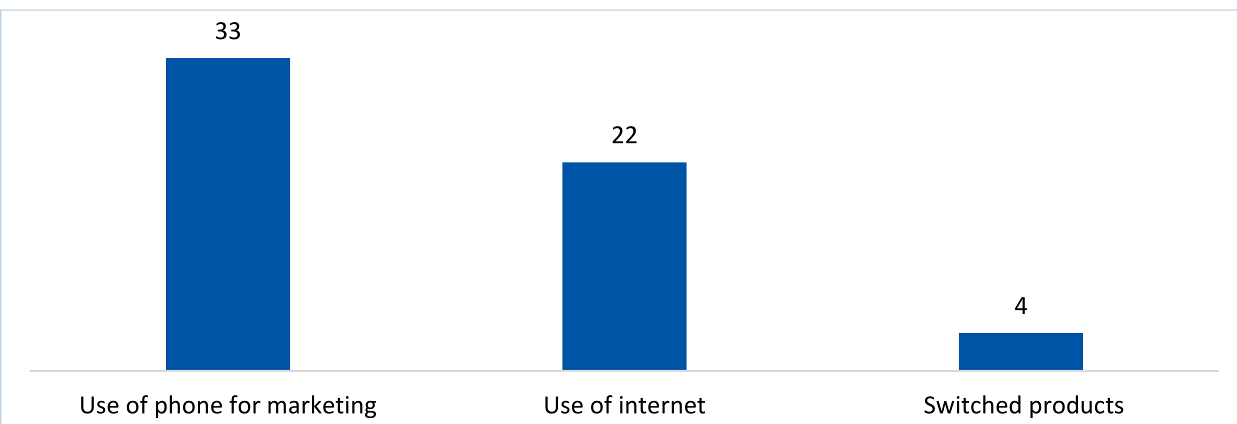
Figure 21: Employers' or business-owners' most-requested policy support for COVID-19 (%)



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

60 per cent of the surveyed business owners haven't applied any adjustments to the business model to reduce being directly in physical proximity with customers. 33 per cent of the businesses adopted the use of phone for marketing and business and 22 per cent adopted the use of the internet (**Figure 22**).

Figure 22: Businesses' strategies to reduce physical proximity with customers (%)[9]



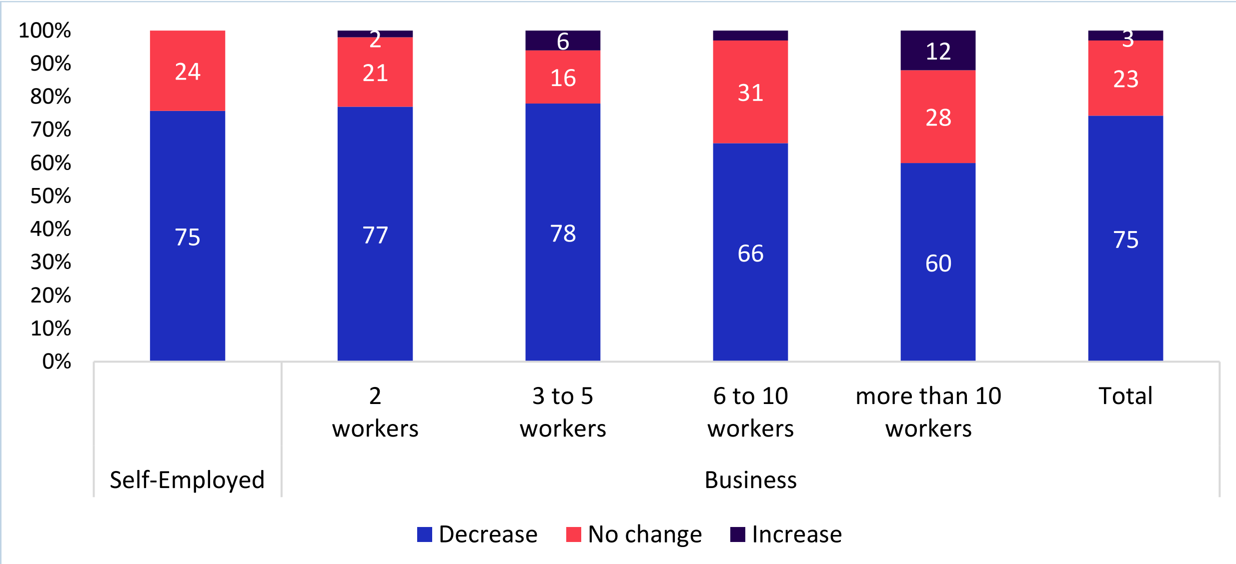
Source: Constructed by authors using the ILO/ERF COVID-19 Monitor.

Three-quarters of the businesses surveyed reported a decrease in revenues; the average revenue drop reaches 50 per cent during the two months preceding the survey compared

[9] Multiple answers are allowed.

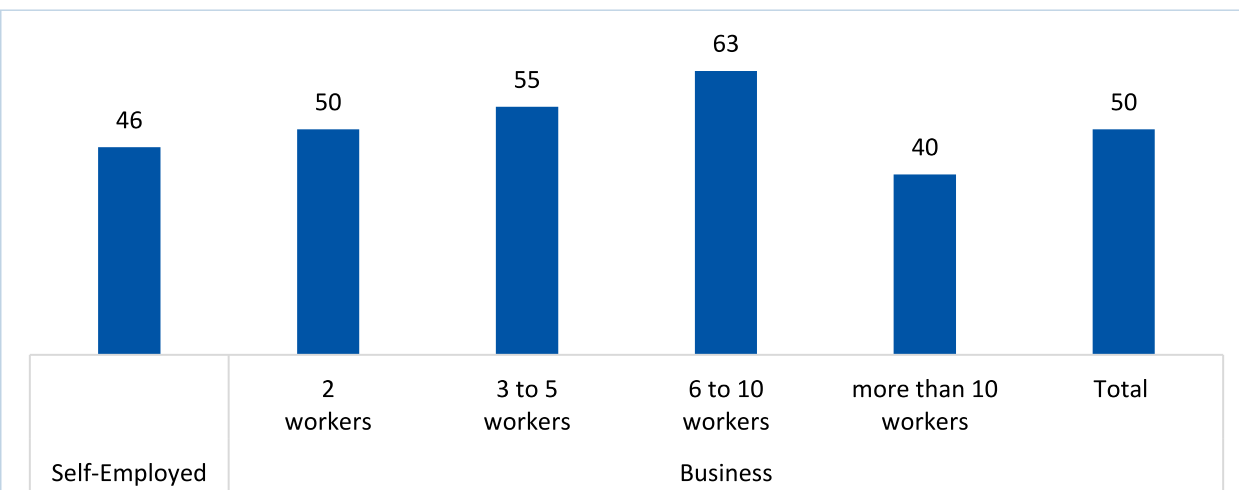
to the same period last year (**Figure 23, Figure 24**). 37 per cent of businesses foresee a decline in sales for the year 2021, compared to 2019 (**Figure 25**) while 38 per cent foresee a better year, and the remaining 25 per cent expect similar levels of revenue.

Figure 23: Average change in sales/revenues in the last 60 days compared to sales/revenue in the same period a year before, by enterprise size



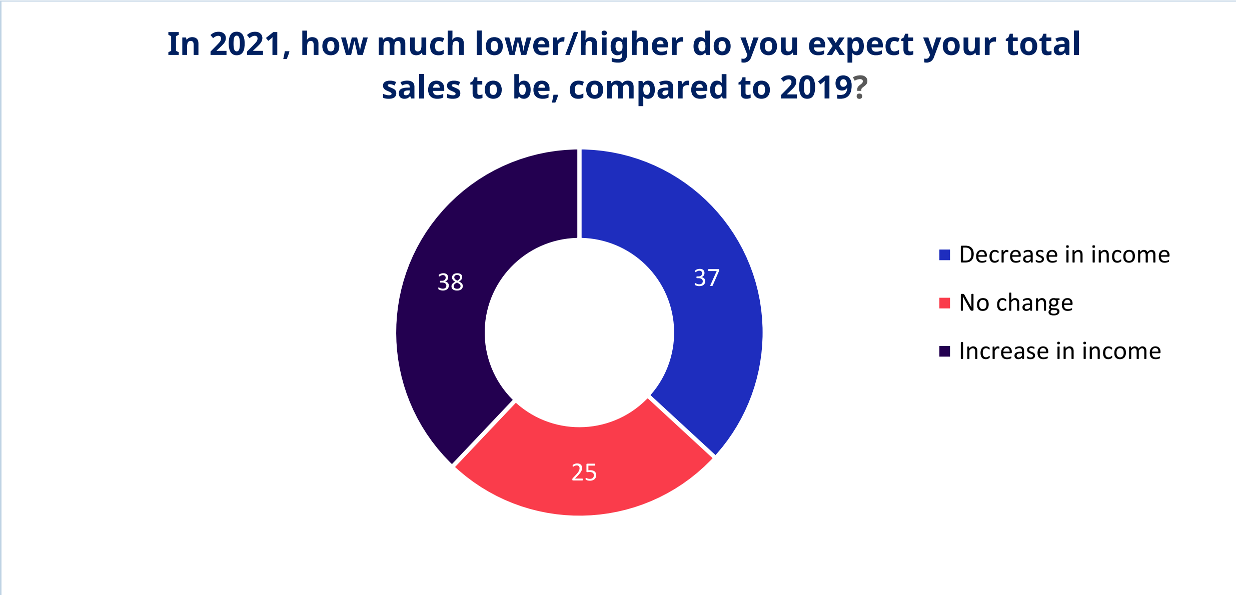
Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Figure 24: Average percentage decrease in sales/revenue reported by enterprises, by enterprise size



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Figure 25 : Sales expectations for 2020 compared to 2019

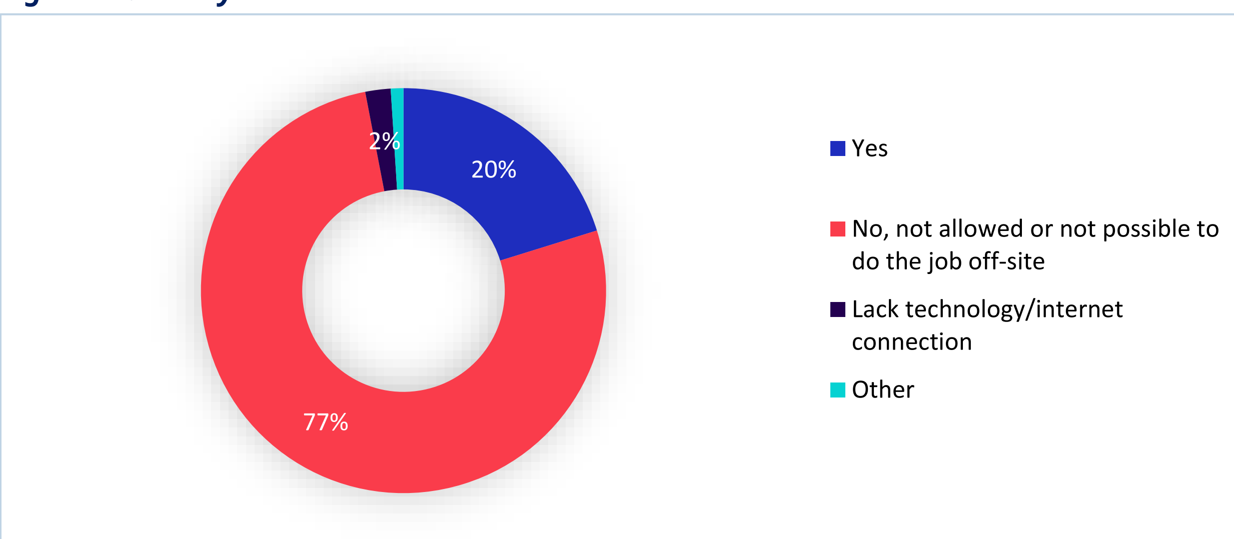


Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor*

4. Shift to online and home-based work

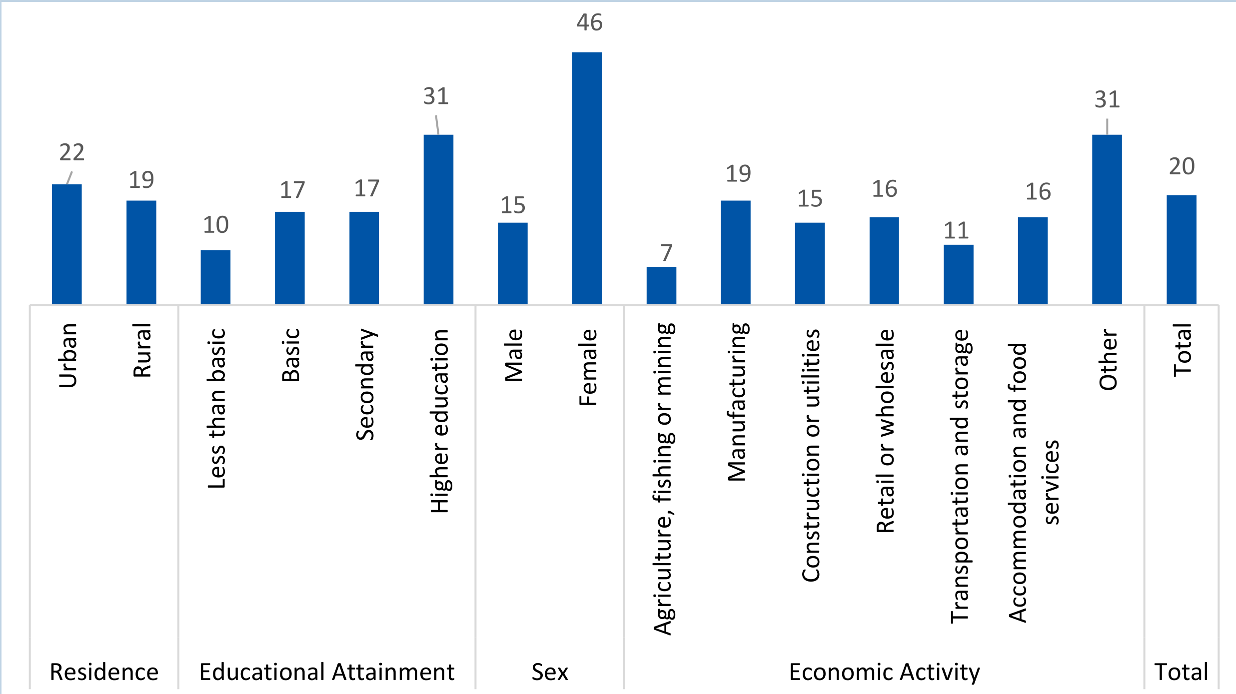
About 20 per cent of workers reported having been able to shift at least part of their professional activity online or to work from home. 77 per cent indicated this was not an option. Access to technology is a constraint for 2 per cent of the sample. The ability to work "remotely" is three times higher amongst those with high education than among those with less than basic education; it is markedly higher among women (**Figure 26**, **Figure 27**).

Figure 26: Ability to work online



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Figure 27: Ability to work from home, by residence, sex, educational attainment,



economic activity[10]

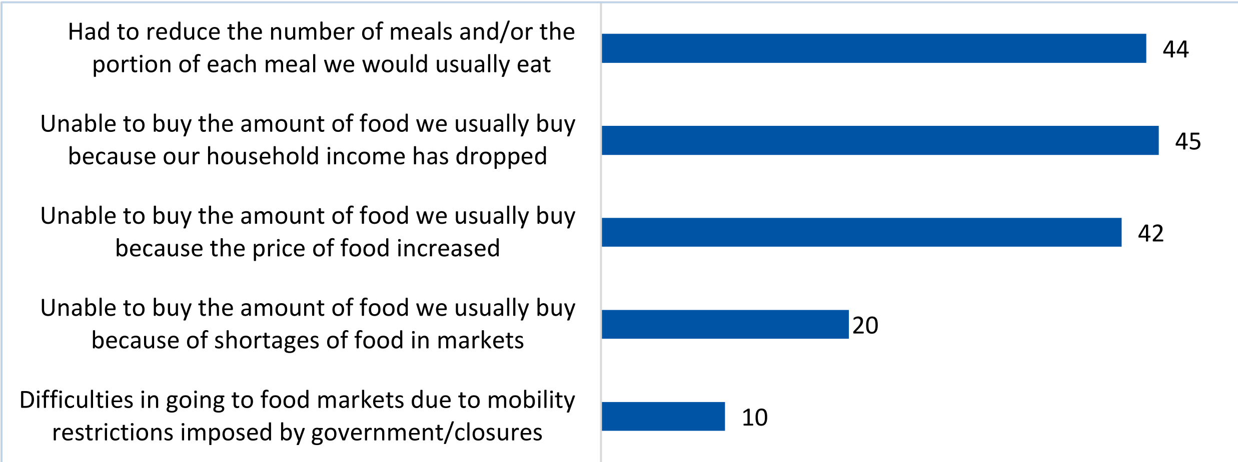
Source: Constructed by authors using the ILO/ERF COVID-19 Monitor.

5. Have you had to…? Household coping strategies

In answering the question "in the past seven days, have you or any other member of your household experienced any of the following…..?", more than 40 per cent of respondents reported that they had to reduce their food intake and/or they were unable to buy the usual amount of food because of an income decrease and/or an increase in food prices (**Figure 28).**

[10] Respondent's economic activity as of February 2020.

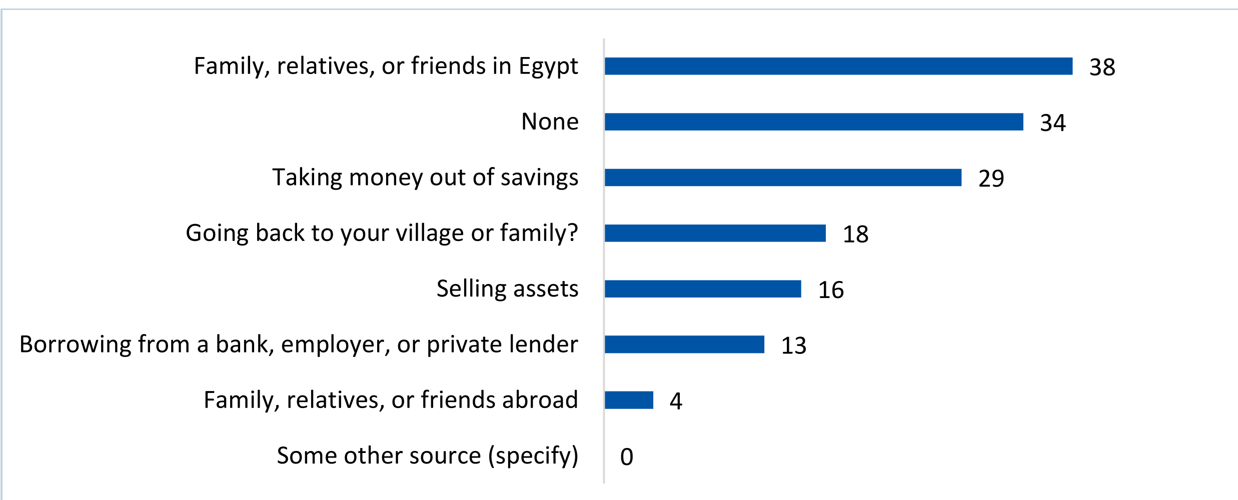
Figure 28: Food security: In the past 7 days, have you or any household member experienced any of the following? (%)



Source: *Constructed by authors using the ILO/ERF COVID-19 Monitor.*

Getting help from friends and relatives in-country and withdrawing money from savings were the most commonly reported coping strategies in order to face hardship (**Figure 29**).

Figure 29: Did you need to resort to any of these coping strategies since the end of February 2020? (%)

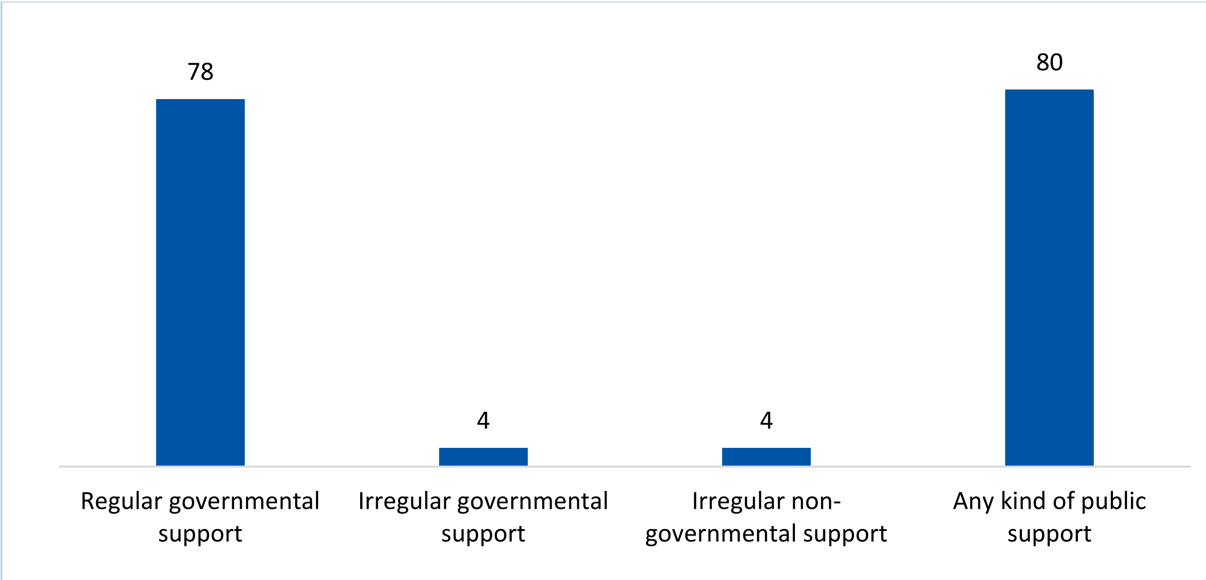


Source: *Constructed by authors using ILO/ERF COVID-19 Monitor*

Four in every five households reported receiving some kind of public support[11], with 78 per cent reporting regular government support[12] and 4 per cent have received unusual governmental and/or non-governmental support in the month prior the survey (**Figure 30)**.

[11] This includes regular and irregular governmental and non-governmental support.
[12] This includes the social protection programs: Takaful and Karama (7 per cent), Forsa (1 per cent), and/or having ration cards (77 per cent).

Figure 30: Which kind of support did you receive in the last month? (%)



Source: *Constructed by authors using ILO/ERF COVID-19 Monitor*

Appendix

The COVID-19 pandemic poses a particular challenge for low- and middle-income countries, as well as vulnerable groups, such as informal and casual workers, and those engaged in survival self-employment. Assessing the impact of COVID-19 on the livelihoods of residents of countries in the Middle East and North Africa (MENA) region is critically important to designing and assessing policy responses to the crisis and to formulating plans for an equitable and sustained recovery. This survey, and the subsequent series of short panel phone surveys, are planned as a means to monitor the effects of the crisis on households in Egypt.

The sample for the household survey were mobile phone users aged 18–64. Random digit dialing, within the range of valid numbers, was used, with up to three attempts if a phone number was not picked up/answered, was disconnected or busy, or picked up but the respondent could not complete the interview at that time. Samples were stratified by country-specific market shares of mobile operators.

Inverse probability weighting was undertaken to reduce bias along with a number of observable dimensions. Weights were created on three levels: Individual, household, and household member. Weights had the following inputs:

- Telephone operators and their market shares, provided by the data-collection firm
- Number of phones by the operator for individuals (Individual weight) and household members (Household weight and household member weight)
- Representative data with comparable demographic and household characteristics to weigh for non-responses

Around 18,800 random number were generated, of which one third picked up and refused. The total sample size of those who completed the survey was 2,000.

Phone calls outcomes

Egypt	Count	%
Phone disconnected/ busy try for up to 3 times	1,646	8.74
Not in service	7,244	38.46
Did not answer/ try for up to 3 times	677	3.59
Picked up and refused	6,684	35.49
Incomplete, and refused	343	1.82
Complete	2,000	10.62
Not Eligible	240	1.27
Total	18,834	100

Table A 1: *Changes in working hours in the last 60 days, by sex, educational attainment, economic activity, sector type, and formality of February 2020.*

Main Characteristics		Decreased by more than 25%	Decreased by 1-25%	Stayed the same	Increased by 1-25%	Increased by more than 25%
Sex	Male	12%	13%	71%	3%	1%
	Female	20%	23%	56%	0%	0%
Educational attainment	Less than basic	18%	10%	71%	1%	0%
	Basic	12%	13%	69%	5%	1%
	Secondary	12%	14%	70%	3%	1%
	Higher education	12%	18%	67%	2%	1%
Economic activity	Agriculture, fishing or mining	12%	11%	75%	2%	0%
	Manufacturing	12%	9%	76%	2%	0%
	Construction or utilities	10%	13%	75%	1%	1%
	Retail or Wholesale	10%	18%	68%	2%	1%
	Transportation and storage	15%	14%	65%	4%	2%
	Accommodation and food services	13%	17%	61%	8%	0%
	Other	16%	16%	65%	2%	1%
Sector	Government/public sector	15%	15%	68%	1%	1%
	Private sector/NGO	12%	14%	69%	3%	1%
Formal job	Informal	14%	15%	67%	3%	1%
	Formal	12%	14%	71%	2%	1%

Table A 2: *Changes in wages in the last 60 days, by sex, educational attainment, economic activity, sector type, and formality of February 2020.*

Main Characteristics		**Decreased by more than 25%**	**Decreased by 1-25%**	**Stayed the same**	**Increased by 1-25%**	**Increased by more than 25%**
Sex	Male	9%	8%	80%	1%	1%
	Female	5%	5%	87%	2%	0%
Educational attainment	Less than basic	14%	8%	74%	1%	2%
	Basic	8%	5%	84%	2%	1%
	Secondary	8%	10%	80%	2%	1%
	Higher education	7%	5%	87%	1%	0%
Economic activity	Agriculture, fishing or mining	7%	12%	80%	0%	0%
	Manufacturing	8%	8%	80%	2%	3%
	Construction or utilities	12%	7%	76%	3%	1%
	Retail or Wholesale	14%	7%	78%	1%	0%
	Transportation and storage	9%	8%	80%	2%	0%
	Accommodation and food services	12%	17%	67%	1%	3%
	Other	5%	5%	89%	1%	0%
Sector	Government/public sector	3%	3%	92%	2%	0%
	Private sector/NGO	11%	10%	76%	2%	1%
Formal job	Informal	12%	11%	74%	1%	1%
	Formal	3%	3%	92%	2%	0%

Table A 3: *Average change in wages between February 2020-January 2021, by sex, educational attainment, formality, sector type, and economic activity of February 2020*

Main Characteristics		**Average change in wages in Dinar**	**Average percentage change in wages (%)**
Sex	Male	-114	-3%
	Female	1	0%
Educational attainment	Less than basic	-171	-7%
	Basic	-19	1%
	Secondary	-138	-3%
	Higher education	-14	0%
Economic activity	Agriculture, fishing or mining	-243	-8%
	Manufacturing	-4	4%
	Construction or utilities	-284	-12%
	Retail or Wholesale	-51	0%
	Transportation and storage	-92	-2%
	Accommodation and food services	-84	0%
	Other	-31	0%
Sector	Government/public sector	-98	1%
	Private sector/NGO	-153	-5%
Formal job	Informal	-198	-6%
	Formal	46	3%

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