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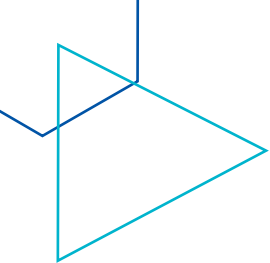
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HIGHLIGHTS: THIRD WAVE JUNE 2021

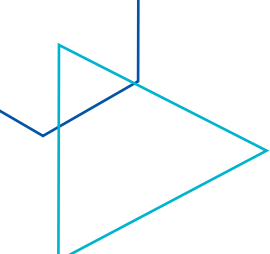
Rapid Labour Force Survey of COVID-19 Impact in Egypt

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Contents

List of Figures	03
Introduction	05
The Covid-19 pandemic in Egypt	07
1. Employment and unemployment	10
2. Wages and income	15
3. Entrepreneurs and small businesses	19
4. Shift to online and home-based work	24
5. Have you had to...? Household coping strategies	25
6. Farmers	27
Appendix	28



List of Figures

Figure 1: COVID-19 case trends in Egypt and government response	8
Figure 2: COVID-19 vaccination doses per 100 person	8
Figure 3: Percentage distribution of respondents, by main job/activity, as of February 2020	9
Figure 4: Percentage change in labour force distribution, by sex and wave	10
Figure 5: Percentage change in unemployment share, by educational attainment and wave (%)	11
Figure 6: Unemployment rates by sex in June 2021*, standard definition (blue line) and including those not actively searching (red line), by sex %	11
Figure 7: Unemployment rates by level of education in June 2021*, standard definition (left) and including those not actively searching (right), %	12
Figure 8: Labour market transitions, February 2020–February 2021 (Situation of working-age individuals in February 2021 as per their situation in February 2020)	12
Figure 9: Labour market transitions, February 2020–June 2021 (Situation of working-age individuals in June 2021 as per their situation in February 2020)	13
Figure 10: Labour market transitions, of formal and informal wage employees , February 2020–February 2021 and February 2020- June 2021 (Situation of working-age individuals in February 2021 and June 2021 as per their situation in February 2020)	13
Figure 11: In the last 60 days, have you experienced any of the following because of COVID-19 or related restrictions? (%)	14
Figure 12: Households' total monthly income change, compared to February 2020	15
Figure 13: Changes in working hours in the 60 days preceding the survey, by sex and wave	16
Figure 14: Changes in wages in the 60 days preceding the survey, by sex and wave	16
Figure 15: Changes working hours in the 60 days preceding the survey, by educational attainment and wave	17
Figure 16: Changes in wages in the 60 days preceding the survey, by educational attainment and wave	17
Figure 17: Changes in working hours in the 60 days preceding the survey, by sector and wave	18
Figure 18: Changes in wages in the 60 days preceding the survey, by sector and wave	18
Figure 19: Percentage distribution of enterprises, by number of workers in February 2020	19
Figure 20: Percentage distribution of enterprises' current status	20
Figure 21: Reported changes due to COVID-19 outbreak and related restrictions, by wave (%)	20
Figure 22: Percentage of employers or business-owners who applied for or currently receive any government support	21
Figure 23: Employers' or business-owners' most-requested policy support for COVID-19 (%)	21
Figure 24: Businesses' strategies to reduce physical proximity with customers (%)	22
Figure 25: Average change in sales/revenues in the last 60 days compared to sales/revenue in the same period a year before, by enterprise size and wave	22

Figure 26: Sales expectations for 2021 compared to 2019, by wave	23
Figure 27: Ability to work from home, by wave	24
Figure 28: Ability to work from home, by residence, sex, educational attainment, economic activity	24
Figure 29: Food security: In the past 7 days, have you or any household member experienced any of the following? (%)	25
Figure 30: Did you need to resort to any of these coping strategies in the last month 2020? (%)	26
Figure 31: Which kind of support did you receive in the last month?, by wave (%)	26
Figure 32: Difficulties farmers faced in June 2021, compared to 2019	27

Introduction¹

This document summarises the key findings of the second wave of rapid labour force surveys conducted between May 21st and July 21st 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 a baseline pre-COVID situation retrospectively 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 dialling approach. It targeted mobile owners aged 18-64.

A sample of 2,000 interviews was collected in the first wave in February 2020. Ninety-two per cent of these respondents consented to be re-interviewed as part of the second wave (1,845 out of 2000); 48 per cent (883 out of 1,845) were reached. An additional refresher sample of 1,124 individuals was added, using Random Digital Dialling (RDD) methods, to reach a total of 2,007 interviews in this second wave.

The survey produces data over three reference periods. The “baseline” pre-COVID situation is defined in February 2020 and is measured retrospectively as part of wave 1 for the panel sample or wave 2 for the refresher sample. Depending on the variable, the “current” situation is defined in either the previous month or the previous week.

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.



¹ This is the third wave of the rapid labour force phone surveys in the series COVID-19 Monitor in Egypt, but the second wave that was conducted by ERF/ILO, the first wave (June 2020) was conducted by the Egyptian Center for Public Opinion Research (Baseera)/ILO and is not included in this analysis.



Key Findings

- ▶ Since the onset of the COVID-19 pandemic, the unemployment share in the population has increased reaching 14 per cent in February 2021 and stayed stable ever since.
- ▶ Since February 2021, unemployment increased most among those with less than basic education (up to 36 per cent), while it decreased by one percentage point for all other educational levels.
- ▶ The unemployment rate stabilized at 21 per cent using the standard definition of unemployment in June 2021, coupled with a slight increase (7 per cent) in the active unemployed population. Individuals with less than basic education were more discouraged to actively apply for jobs (30 per cent) than in February (27 per cent). Informal employees were still more likely to fall in unemployment (10 per cent) in June 2021 than those in formal employment (4 per cent).
- ▶ Temporary lay-offs and delays in wage payments persist, with around one in four employees affected in the 60 days preceding the survey. There is no clear evidence of recovery within households in monthly incomes. Around 47 per cent of the surveyed respondents in June 2021 reported a decrease in their household income compared to pre-COVID-19, with an increase of 6 percentage points since February 2021. More businesses reported having permanently laid-off or reduced wages in June 2021, compared to February 2021.
- ▶ Women were less affected by wage reductions than men, in large part due to their over-representation in the public sector, where nominal wages have not suffered declines. On the other hand women are over-represented in sectors most affected by lockdowns, such as in education.
- ▶ Around 83 per cent of the surveyed businesses reported a decrease in revenues. Self-employers and microenterprises were the more affected groups by sales reductions. 74 per cent of business report they're operating under normal working hours in June 2021, compared 69 per cent in February 2021.
- ▶ Lending programmes continue to be the most commonly used and required form of business support.
- ▶ About 1 in 5 workers reported having been able to shift to remote working arrangements. Among these female workers, those with higher education and workers residing in urban areas were more represented (25 per cent).
- ▶ The share of recipients of new government support doubled in the last six months, while the percentage of new non-governmental support tripled from 4 to 12 per cent.

The Covid-19 pandemic in Egypt

Egypt detected its first COVID-19 case in February 2020. Thanks to the government's solid and proactive responses, the pandemic remained under control during the following weeks. Lockdown measures included the suspension of international air travel, imposing a nighttime curfew, and forbidding large gatherings.² Nevertheless, the daily count of COVID-19 cases was moving upward, albeit at a slow pace, until it reached a peak of 1774 cases on June 20th (Figure 1). Afterwards, the pandemic receded again until a second wave surged in November. The vaccination campaign has officially started in Egypt on 26 March 2021, and by the end of September, around 5 per cent of Egypt's population has been fully vaccinated (Figure 2).

Overall since the initiation of the pandemic lockdown measures have been less stringent in Egypt as compared to other countries in North Africa. The impact on the economy has therefore also been more limited; Egypt achieved 3.6 per cent growth in 2020, only down 2 points from 5.6 per cent in 2019.³

On the socio-economic front, Egypt's response included the creation of a COVID-19 emergency fund amounting to USD 6.13 billion (EGP 100 billion, equivalent to 1.8 per cent of GDP). The fund focuses on upgrading health facilities and providing economic support to the 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 have been introduced in order to meet part of this expenditure increase.

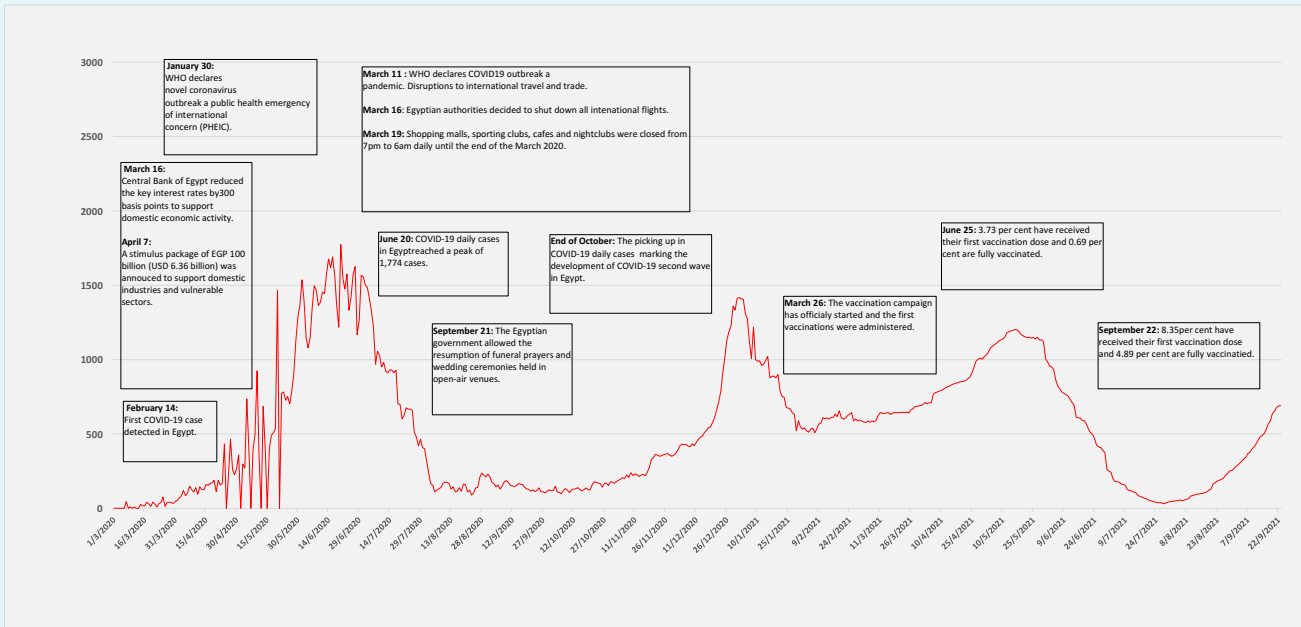
On the monetary side, the Central Bank of Egypt (CBE) lowered its key interest rate by 300 basis points in March 2020. It reduced the preferential interest rate from 10 per cent to 8 per cent on loans to tourism, industry, agriculture, and construction sectors, as well as for housing for low-income and 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.



² IMF. 2021. "Policy Responses to COVID-19, Policy Tracker Database." February.

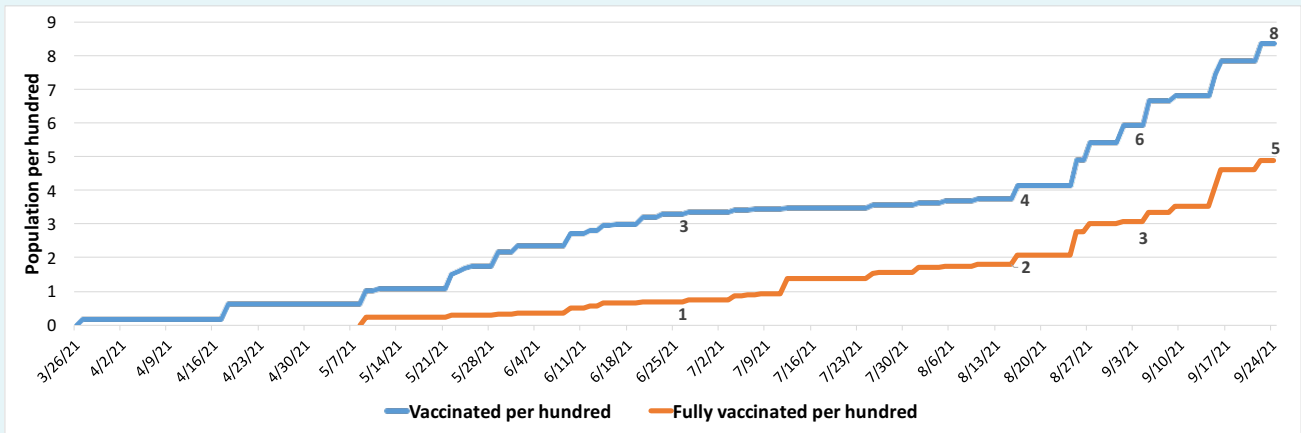
³ Ministry of Planning and Economic Development. National Data. Retrieved from: <https://mped.gov.eg/GrossDomestic?lang=en>

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



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

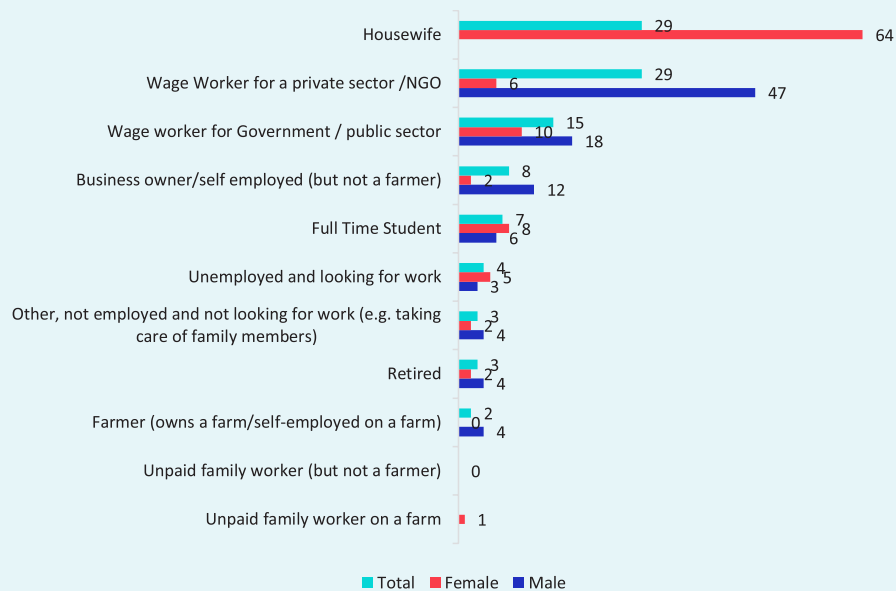
► **Figure 2: COVID-19 vaccination doses per 100 person**



Source: Constructed by authors using the WHO COVID-19 Vaccinations' Database

Figure 3 illustrates the distribution of Egyptian participants in the ILO/ERF COVID-19 survey, with respect to their job activity in February 2020.

► **Figure 3:** Percentage distribution of respondents, by main job/activity, as of February 2020⁴



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



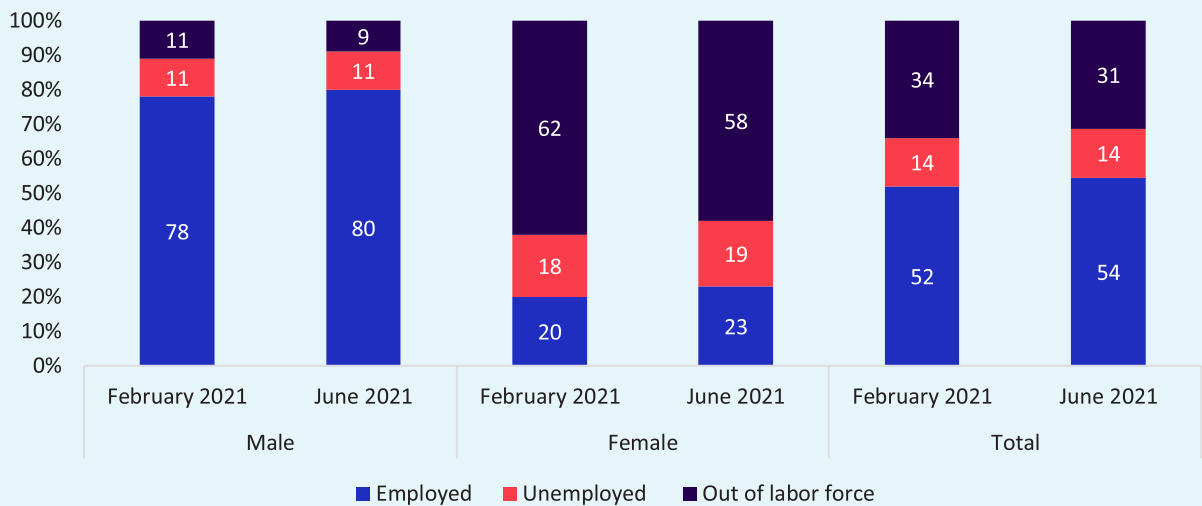
⁴ The figure covers the distribution of the two waves.

► Employment and unemployment⁵

In our retrospective baseline measure of the pre-pandemic baseline, 54 per cent reported they were employed, 4 per cent reported they were unemployed (and looking for a job), and 41 per cent they were inactive. Comparing with that situation in February 2020, unemployment increased by around ten percentage points, reaching 14 per cent by February 2021, and remaining at that level in June 2021. A reduction in inactivity and an increase in employment rates is also observed (Figure 4). Employment increased slightly among both males and females; unemployment increased slightly only among females.

When looking at unemployment by educational level, those with low education faced the highest unemployment shares in June 2021. For all other education groups unemployment contracted.

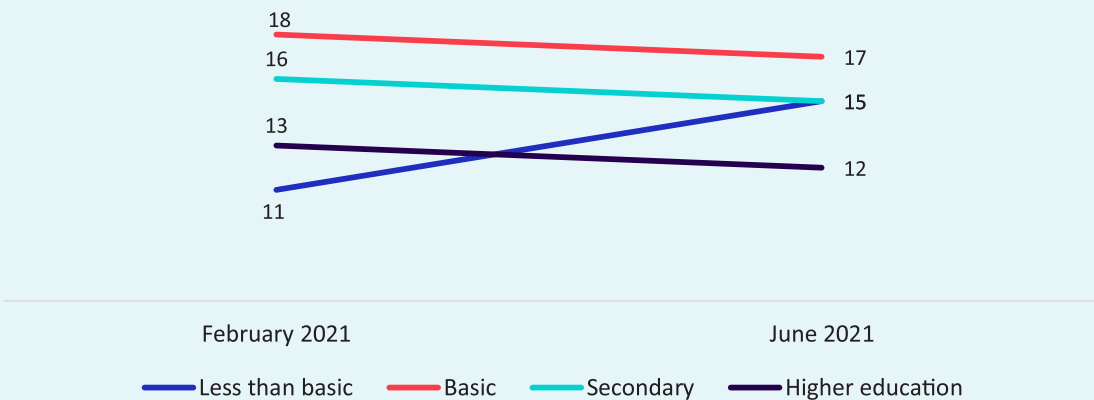
► **Figure 4:** Percentage change in labour force distribution, by sex and wave



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

⁵ For the distribution of the working-age population by economic status (Figure 3), the survey uses a direct question about the status of February 2020 (pre-COVID). For the current status (Figures 4-8), the survey covered more detailed questions, where employment is defined by at least one working hour in the preceding seven days/or being attached to a job, unemployment is defined by “wanting, willing, and available to work in the preceding seven days”, and “actively searched for a job in the four weeks preceding the survey”.

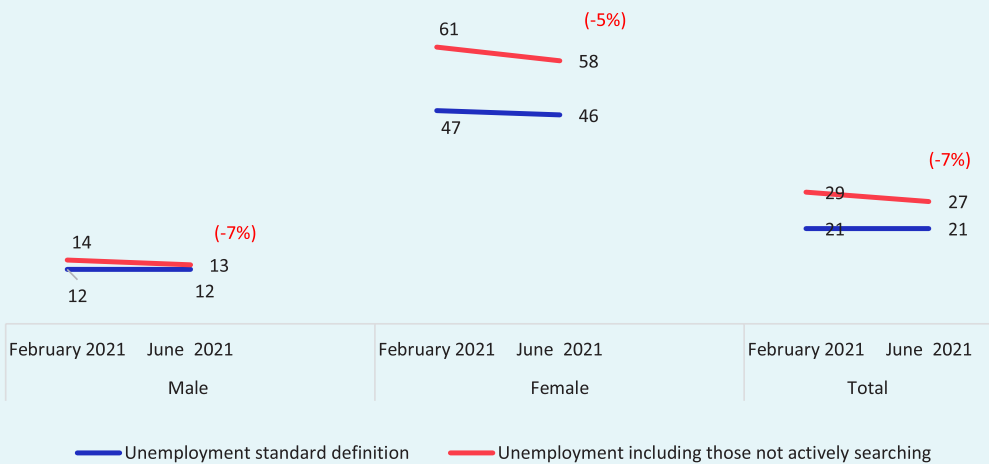
► **Figure 5:** Percentage change in unemployment share, by educational attainment and wave (%)



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

The below figures present two different measures of the unemployment rate: (i) the standard definition, which counts individuals who were out of work, available and actively searching for a job in the past week, and a (ii) broad definition which drops the job search condition and includes individuals who were not actively seeking employment during the reference period. The latter definition is often used to account for “discouraged workers”. The standard unemployment rate remained stable at 21 per cent in February and June 2021, and a slight decrease in discouraged workers is observed from February to June 2021 (-7 per cent). It is also worth noting that the difference between both definitions of unemployment is more pronounced among women than among men (Figure 6). Focusing the analysis on the educational level of the unemployed revealed that individuals with less than a basic education were associated with higher levels of unemployment under both definitions in June 2021 compared to February 2021 (Figure 7).

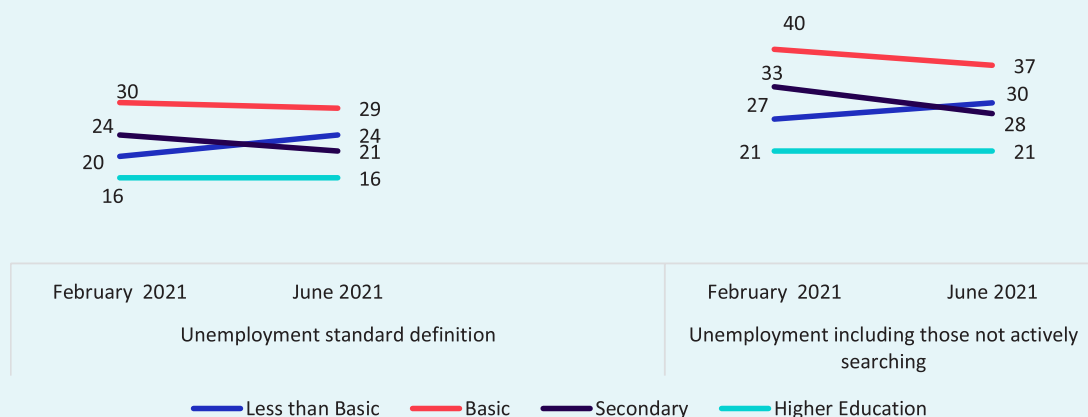
► **Figure 6:** Unemployment rates by sex in June 2021*, standard definition (blue line) and including those not actively searching (red line), by sex %



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

Note: Measured for the week prior the survey using investigation questions

► **Figure 7:** Unemployment rates by level of education in June 2021*, standard definition (left) and including those not actively searching (right), %



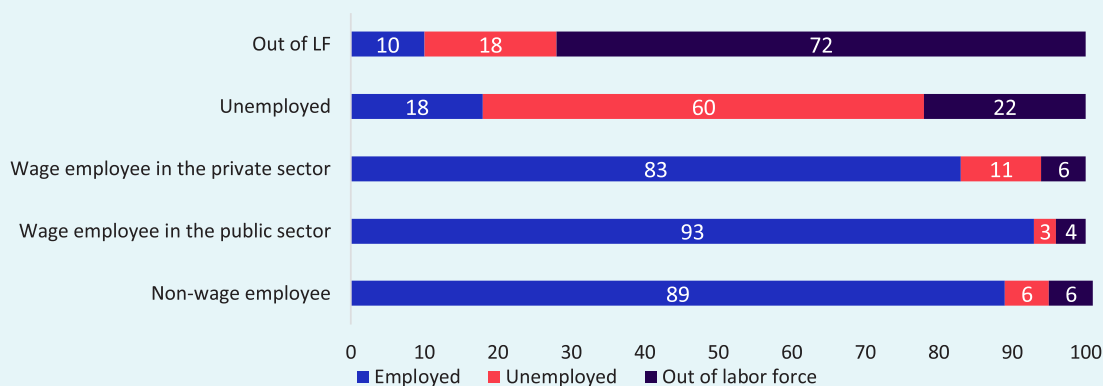
Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

Note: Measured for the week prior the survey using investigating questions

No major shifts between employment, unemployment and inactivity are observed between February 2021 and June 2021, indicating the labour market remains stable with fairly high levels of unemployment and slightly higher employment rates.

Considering the inactive population pre-COVID, 28 per cent and 34 per cent became active in February 2021 and June 2021, respectively. Wage employees in the public sector remained more protected than their private counterparts as only 3 per cent and 1 per cent of the public sector lost their jobs in February 2021 and June 2021, respectively (Figure 8, Figure 9). Informal employees, on the other hand, were more likely to fall in unemployment (10-11 per cent) than those benefitting from social insurance coverage (4 per cent), with almost no change between February 2021 and June 2021 (Figure 10).

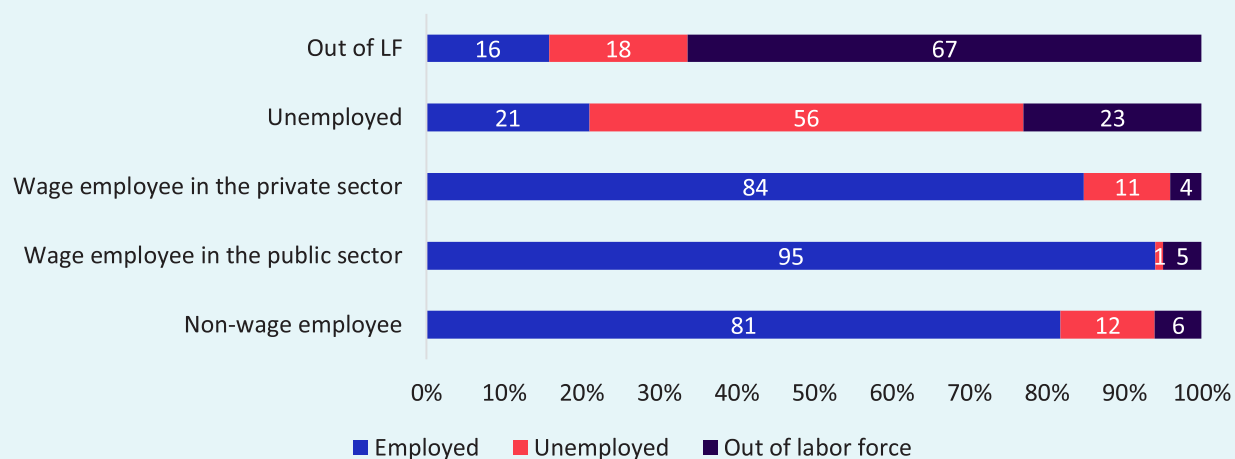
► **Figure 8:** Labour market transitions, February 2020–February 2021 (Situation of working-age individuals in February 2021 as per their situation in February 2020)



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

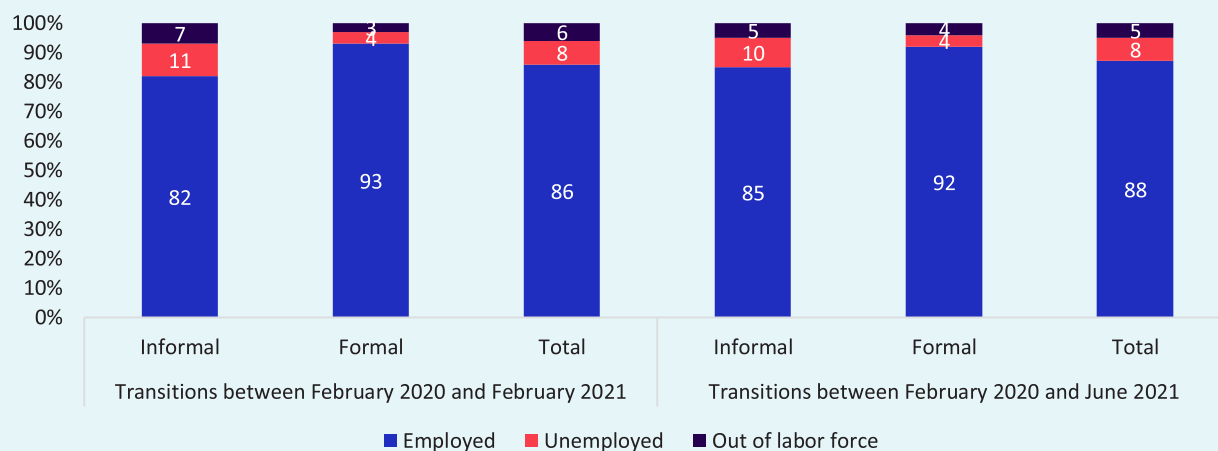
Note: Non-waged workers include the self-employed on a farm, employers, and unpaid family workers in February 2020.

► **Figure 9:** Labour market transitions, February 2020–June 2021 (Situation of working-age individuals in June 2021 as per their situation in February 2020)



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

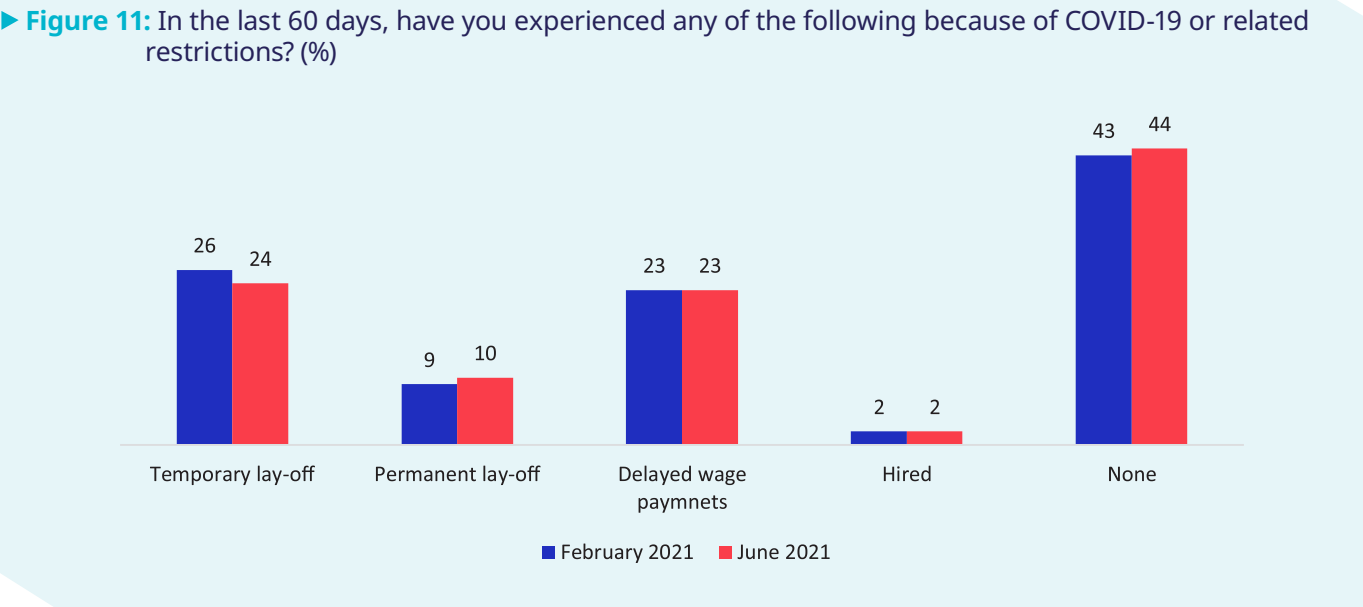
► **Figure 10:** Labour market transitions, of formal and informal wage employees⁶, February 2020 – February 2021 and February 2020 - June 2021 (Situation of working-age individuals in February 2021 and June 2021 as per their situation in February 2020)



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

⁶ Formality is defined as benefiting from social insurance coverage.

Figure 11 confirms the above findings with persistently high levels (around a quarter of the surveyed wage employees) of temporary lay-off or delays in wage payments being reported.



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

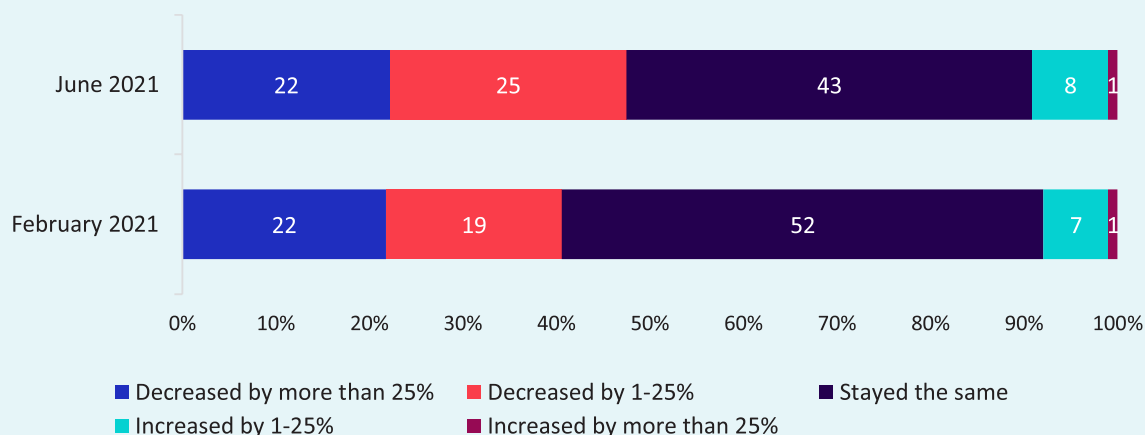
Note: Multiple answers were allowed



► Wages and income

In June 2021, around 47 per cent of the surveyed respondents reported a decrease in their household income since February 2020, compared to 41 per cent in February 2021, with reductions of 25 per cent or more of their income. The percentage of households reported having the same income declined from 52 per cent in February 2021 to 43 per cent in June 2021 (Figure 11).

► **Figure 12:** Households' total monthly income change, compared to February 2020



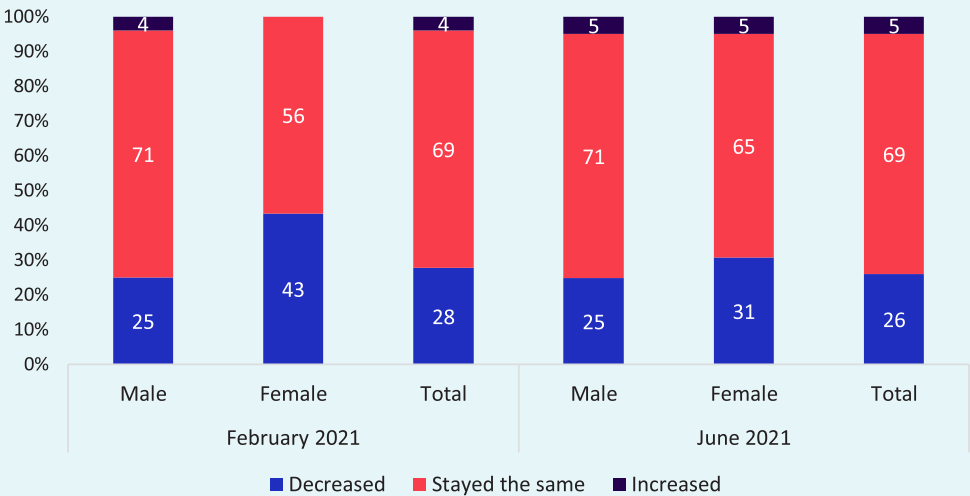
Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

Throughout the two waves, male wage employees suffered more than female wage employees from wage reductions. By June 2021, male wage employees were twice as affected by wage reductions as females (18 per cent versus 9 per cent, respectively). However, females were more likely to face a drop in the working hours.

Results of both waves show that the government sector was less affected by wage reductions (5 per cent) than the private sector (22 per cent) (Figure 17, Figure 18). The decline in working hours in the public sector mirrors the country's lockdown measures.

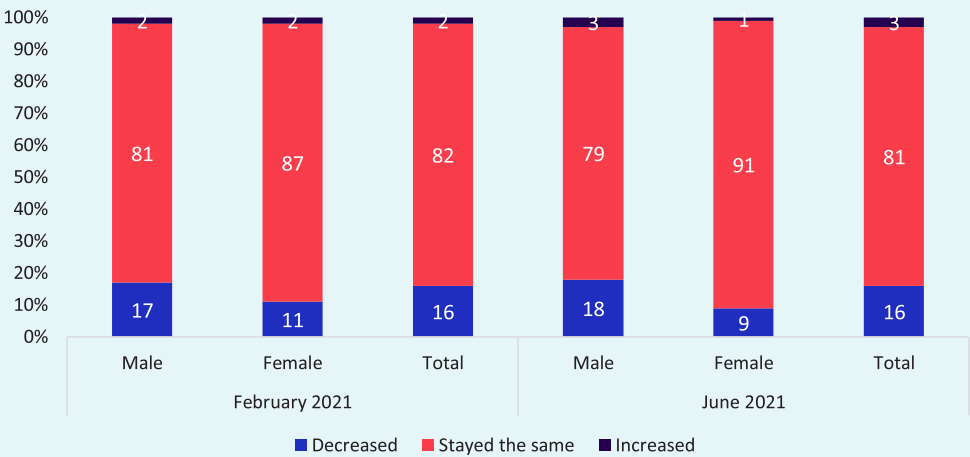
The larger share (62 per cent) of the female wage employees working in the government sector pre-COVID, compared to only 28 per cent of the male wage employees, explains the lower impact on females' wages. With 44 per cent of the wage females working in the education sector, the decline in working hours among females was more apparent, especially with the times of school lockdowns.

► **Figure 13:** Changes in working hours in the 60 days preceding the survey, by sex and wave



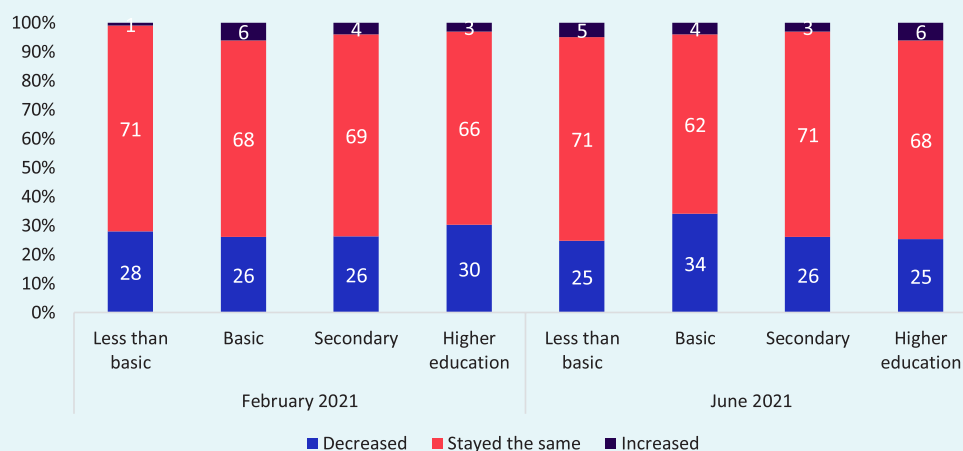
Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

► **Figure 14:** Changes in wages in the 60 days preceding the survey, by sex and wave



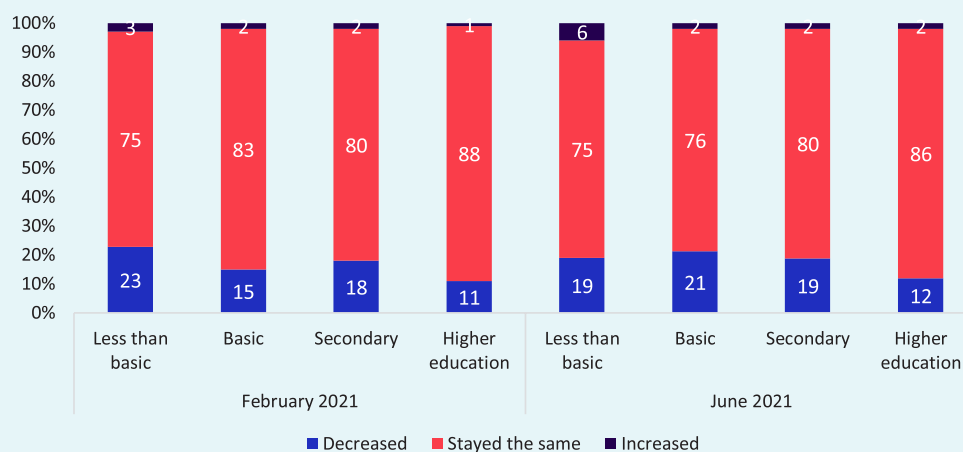
Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

► **Figure 15:** Changes working hours in the 60 days preceding the survey, by educational attainment and wave



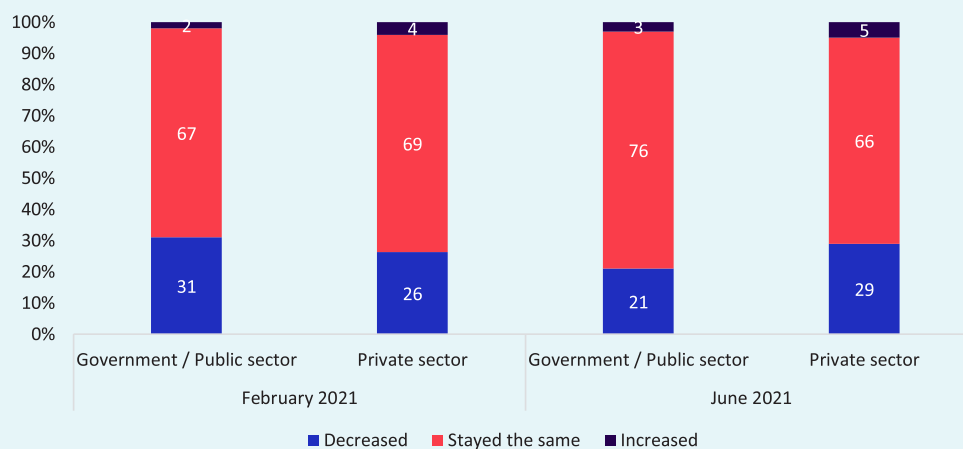
Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

► **Figure 16:** Changes in wages in the 60 days preceding the survey, by educational attainment and wave



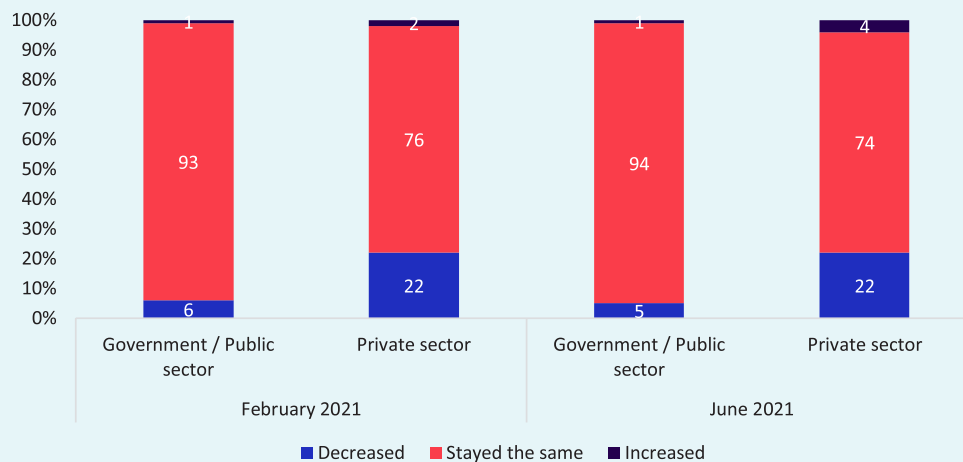
Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

► **Figure 17:** Changes in working hours in the 60 days preceding the survey, by sector and wave



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

► **Figure 18:** Changes in working hours in the 60 days preceding the survey, by sector and wave



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

► Entrepreneurs and small businesses

Our sample of surveyed businesses⁷ includes 54 per cent of self-employed individuals and 36 per cent of micro-enterprises employing 2 to 5 employees (Figure 19).

► **Figure 19:** Percentage distribution of enterprises, by number of workers in February 2020



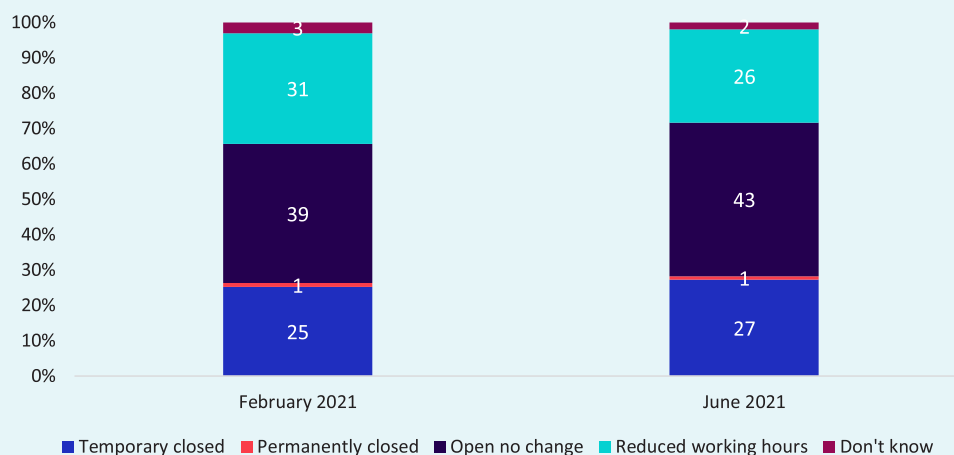
Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

By June 2021, around 43 per cent of businesses reported the resume of activity without any changes, and 26 per cent are operating under reduced working hours, compared to 39 per cent and 31 per cent in February 2021, respectively (Figure 20).



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

► **Figure 20:** Percentage distribution of enterprises' current status

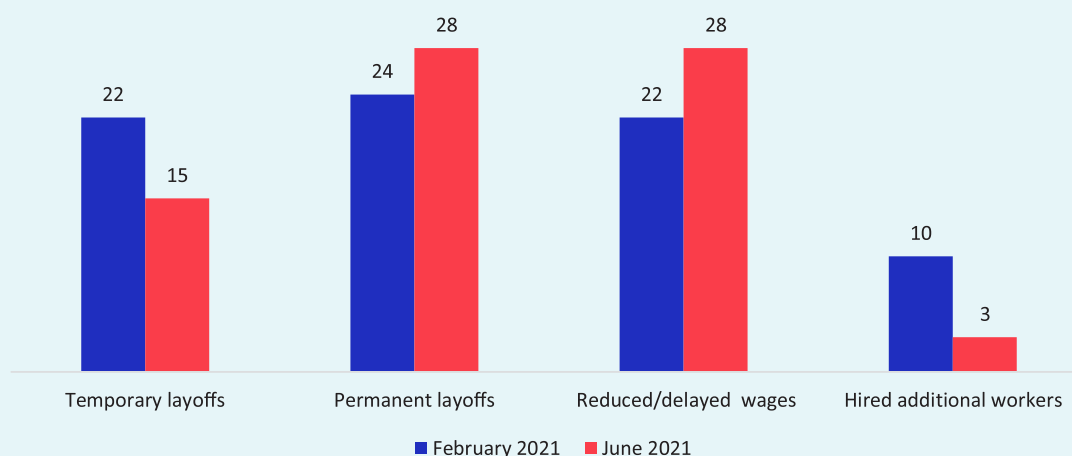


Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

Note: Temporary closure includes those who closed directly following government lockdown due to other challenges related to the COVID-19 outbreak or those who temporarily closed due to factors unrelated to the COVID-19 outbreak

The analysis in Figure 21 revealed that firms are still suffering from the COVID-19 repercussions and are still resorting to different coping strategies, including downsizing to reduce their operational costs. By June 2021, more businesses (28 per cent compared to 24 per cent in February 2021) were still reporting permanent lay-offs, reductions or delays in wage payments, and businesses hired less additional workers.

► **Figure 21:** Reported changes due to COVID-19 outbreak and related restrictions, by wave (%)

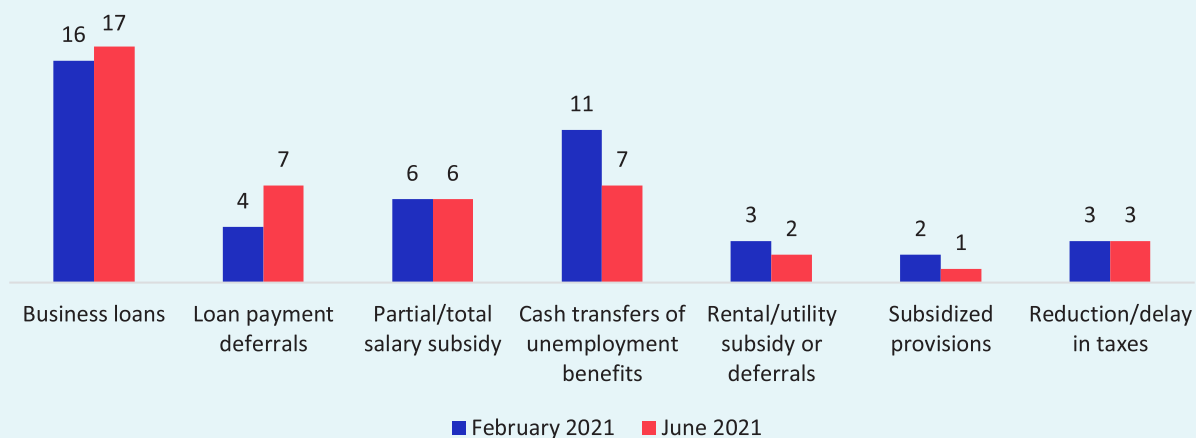


Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

Note: Changes reported by employers. Multiple answers were allowed

Only around 30 per cent of all businesses reported having applied for or currently receiving government support in February and June 2021. Lending programmes continue to be the most commonly used and required form of business support (Figure 22, Figure 23).

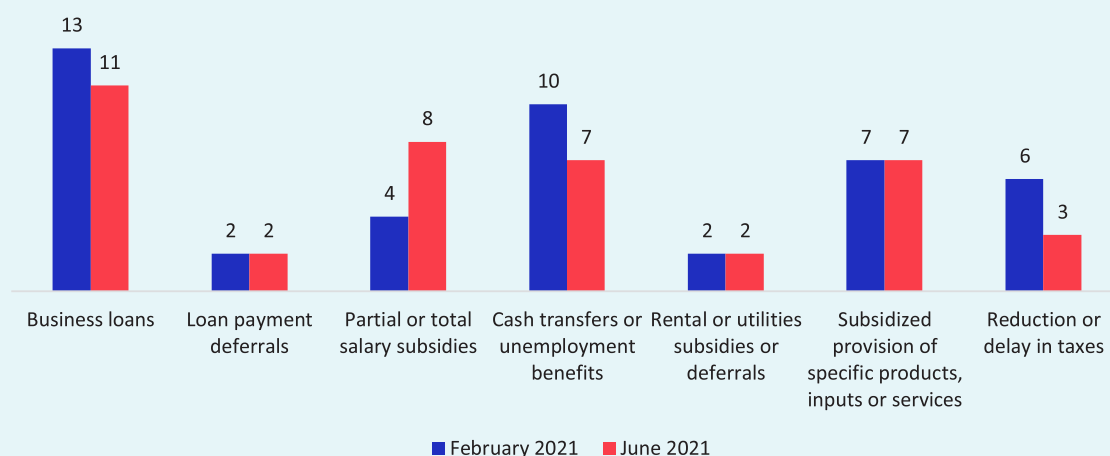
► **Figure 22:** Percentage of employers or business-owners who applied for or currently receive any government support



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

Note: Multiple answers were allowed

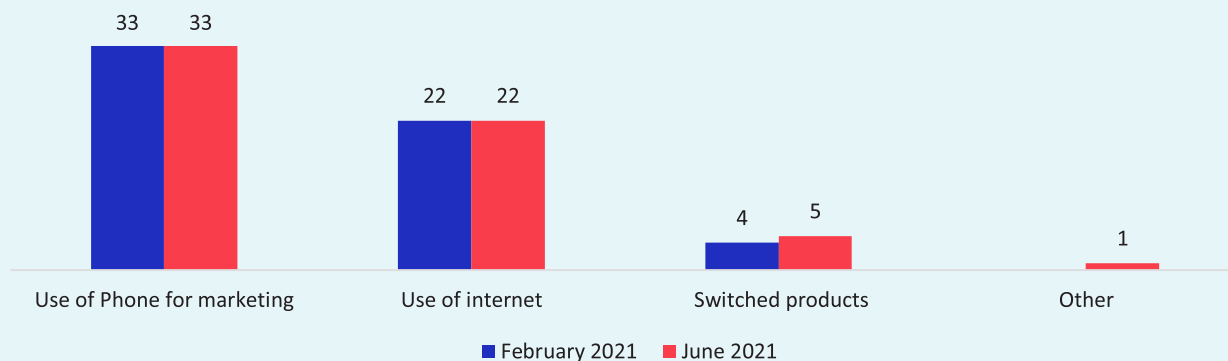
► **Figure 23:** Employers' or business-owners' most-requested policy support for COVID-19 (%)



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

By June 2021, around 59 per cent of the surveyed business owners have not adjusted their business model to reduce being directly in physical proximity with customers. Meanwhile, only around one-third (33 per cent) of businesses adopted the use of the phone for marketing and business, and 22 per cent adopted the use of the internet with no change over time (Figure 24).

► **Figure 24:** Businesses' strategies to reduce physical proximity with customers (%)

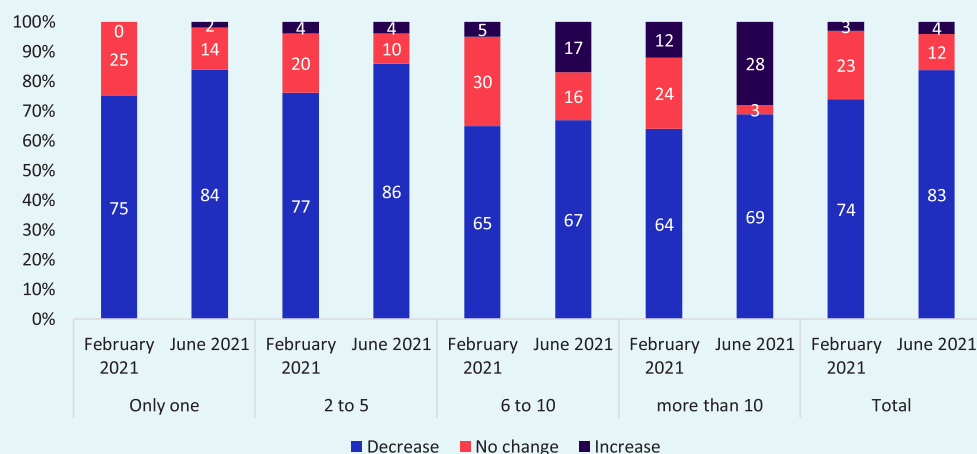


Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

Note: Multiple answers were allowed

In June 2021, a higher percentage of the surveyed businesses reported a decrease in revenues (83 per cent) compared to February 2021. The drop in revenue during the two months preceding the survey compared to the same period last year was more significant in smaller businesses (5 or less employees), especially in the second wave (Figure 25). The sales expectations reflect the revenue decline that the business owners experienced in the 60 days preceding the survey, where a decrease in the sales expectation was reported by 45 per cent in June 2021 compared to 37 per cent in February 2021.

► **Figure 25:** Average change in sales/revenues in the last 60 days compared to sales/revenues in the same period a year before, by enterprise size and wave⁸

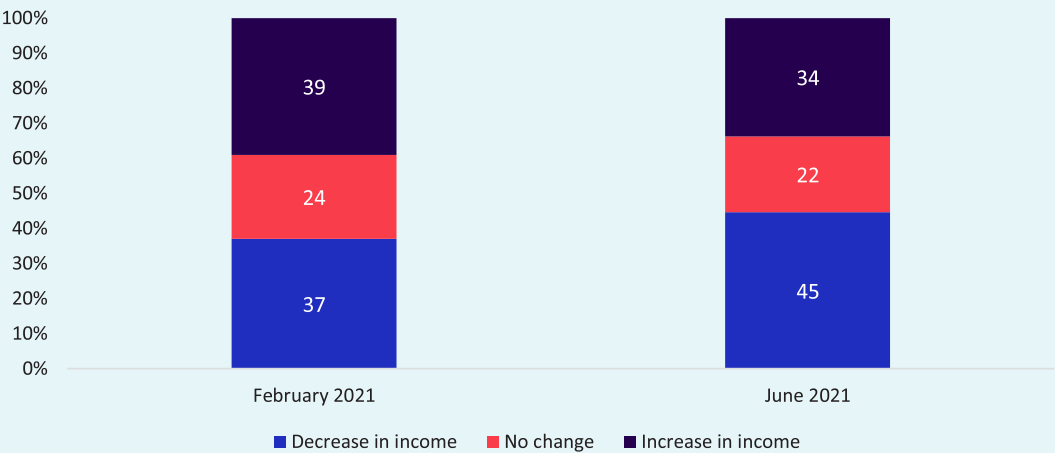


Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

⁸ The firm size is defined in February 2020 (pre-COVID-19) and the figure covers only business owners of the refresher sample in the second waves

On the other hand, 34 per cent and 39 per cent of the surveyed employers in February 2021 and June 2021, respectively foresee a better year (Figure 26).

► **Figure 26:** Sales expectations for 2021 compared to 2019, by wave

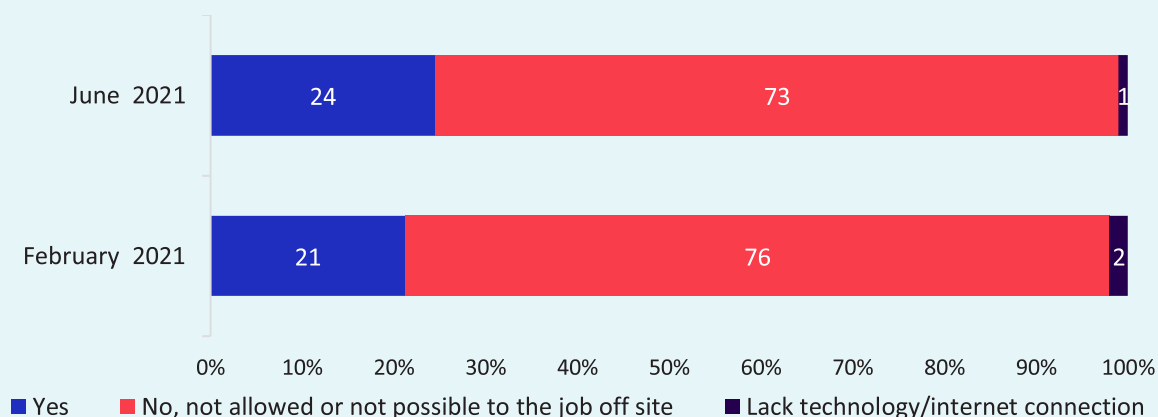


Source: Constructed by authors using the ILO/ERF COVID-19 Monitor

► Shift to online and home-based work

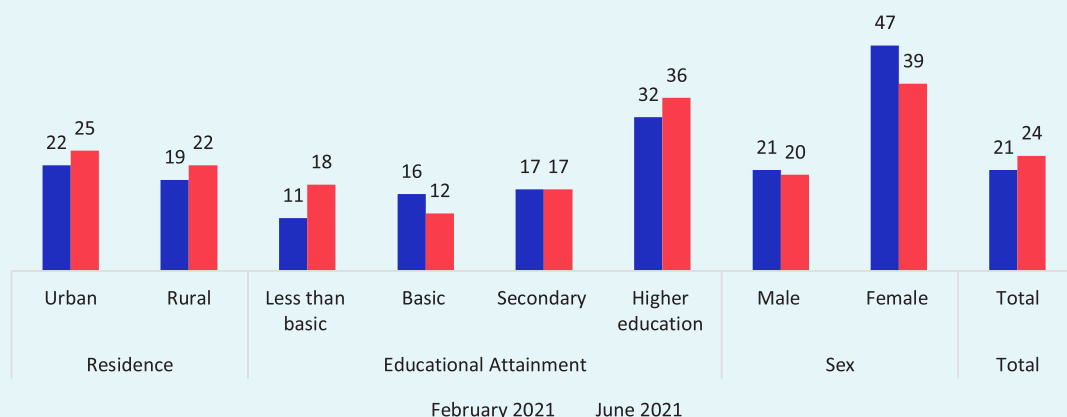
The percentage of workers reporting to have been able to shift at least part of their professional activity to remote work slightly increased from 21 per cent in February 2021 to 24 per cent by June 2021 (Figure 27). Overall, female workers remained the highest group to work from home⁹ (39 per cent), followed by highly educated workers (36 per cent) and urban areas residents (25 per cent) (Figure 28).

► **Figure 27:** Ability to work from home, by wave



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

► **Figure 28:** Ability to work from home, by residence, sex, educational attainment, economic activity¹⁰



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

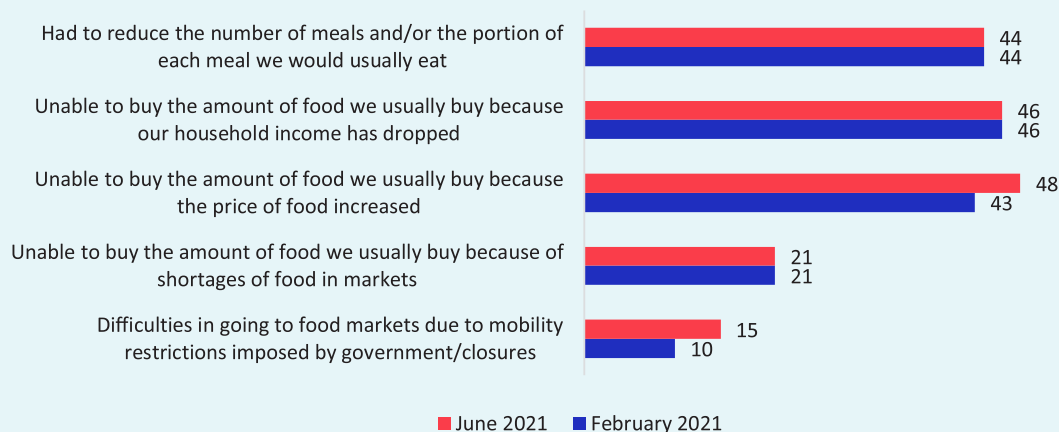
⁹ This can be explained by the high percentage of female wage employees working in the education center.

¹⁰ Respondent's economic activity as of February 2020.

► 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 continue to report: (i) reductions in their food intake; (ii) inability to buy the usual amount of food because of an income decrease or an increase in food prices by June 2021. There are almost no changes between February 2021 and June 2021 in the reported difficulties, except for mobility restrictions or increase in food prices. Both percentages decrease in June 2021 indicate retrieving some stability in the food market (Figure 29).

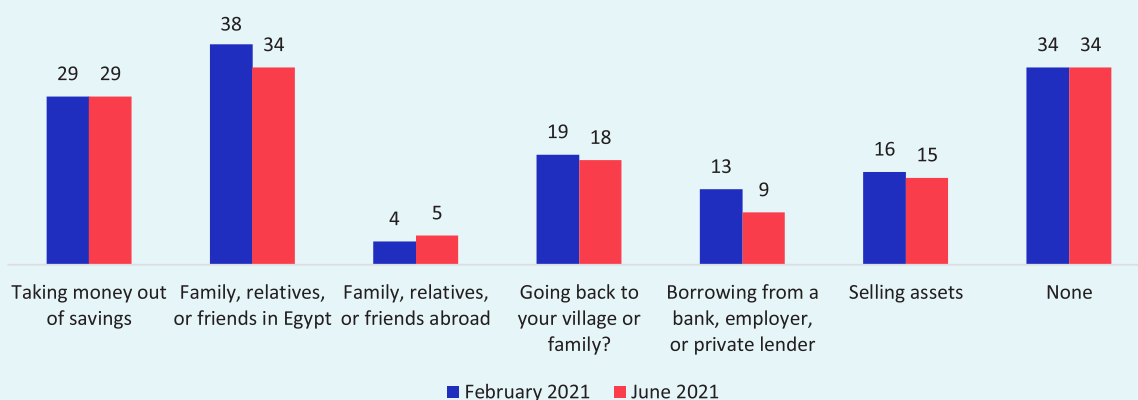
► **Figure 29:** Food security: In the past 7 days, have you or any household member experienced any of the following? (%)



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 common coping strategies utilized during February 2021 and June 2021 to face the challenges caused by the COVID-19 pandemic, while around a third of the surveyed respondents (34 per cent) reported not to have resorted to any of the mentioned coping strategies (Figure 30).

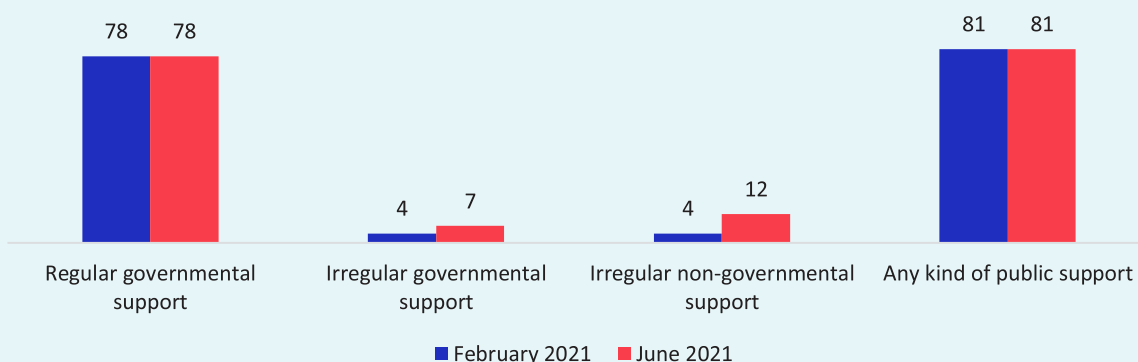
► **Figure 30:** Did you need to resort to any of these coping strategies in the last month 2020?¹¹(%)



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

Around four-fifths of the respondents reported receiving a public support¹² in February 2021 and June 2021, with regular government support remaining the most commonly distributed (78 per cent) throughout the period of analysis (Figure 31). The percentage of irregular governmental support recipients doubled between the two waves, while the percentage of irregular non-governmental support tripled.

► **Figure 31:** Which kind of support did you receive in the last month?, by wave (%)¹³



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

¹¹ The reference time in the first wave in February 2021 was since February 2020. Only panel observations were included in the second wave in this figure.

¹² This includes regular and irregular governmental and non-governmental support.

¹³ In February 2021- June 2021, 76-77 per cent of the respondents mentioned the ration cards, 8 per cent mentioned Takaful and Karama and 0-1 per cent mentioned Forsa program.

► Farmers

In addition to expecting changes in crops' price and harvest in June 2021 compared to 2019, the surveyed farmers were asked to report the number of seeds and inputs used in their farms. Around half of the surveyed respondents (51 per cent) reported using fewer seeds and inputs, 49 per cent are expecting to achieve a lower harvest, and 72 per cent believe that the crop prices will decrease (Figure 32).

► **Figure 32:** Difficulties farmers faced in June 2021, compared to 2019



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



Appendix

For follow-up waves, previous wave respondents were re-contacted if they consented to follow-up in the previous wave. On the third call, up to three attempts were used, including contacting second and family/friend numbers, if provided in wave one. If the individual could not be reached or refused, a refresher individual was added to the sample in their place, randomly selected as with base wave respondents.

Inverse probability weighting was undertaken to reduce bias along with several 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

The panel attrition models use a few base wave variables in addition to those used for initial weighting.

A specific additional variable is:

- Telephone operator
- Household income (categorically) in February 2020
- Base wave labour market status (employed, unemployed (search required), out of labour force)
- Interactions with sex for categorical income and base wave labour market status

The refresher weights are created in an identical fashion to the base wave, initial weights, but for the refresher samples within the subsequent waves of the panel.

For subsequent waves (waves after the base wave), cross-sectional weights combine the panel and refresher data. Weights are normalized to one within each panel and refresher samples and then combined into a single, representative cross-sectional weight.

All respondents who consented (1,845 of 2000) to follow up in the prior wave were contacted in an attempt to include them in the subsequent wave. Varying degrees of follow-up occurred; 47.9 per cent (1883 of 1,845) February 2021 respondents in Egypt were successfully tracked to June 2021.

► **Table 1:** Phone calls outcomes for Egypt panel sample

Result of call first try	n	col%
Phone disconnected/ busy Try for up to 3 times	86	4.7
Did not answer try for up to 3 times	170	9.2
Picked up and refused	657	35.6
Incomplete, and refused	49	2.7
Complete	883	47.9
Total	1845	100.0

For the refresher sample, around 10,462 random numbers were generated as refresher individuals, of which one-third was not in service. The total sample size of those who completed the survey was 1,124.

After excluding phones that were not in service, disconnected/busy (after multiple calls), and individuals who were not eligible from the response rate calculations, the response rates in the panel and refresher samples are 50 per cent and 26 per cent, respectively.

► **Table 2:** Phone calls outcomes for Egypt refresher sample

Result of call first try	n	col%
Phone disconnected/ busy Try for up to 3 times	625	6.0
Not in service	5289	50.6
Did not answer try for up to 3 times	311	3.0
Picked up and refused	2595	24.8
Incomplete, and refused	373	3.6
Incomplete, and call returned try for up to 3 times	1	0.0
Complete	1124	10.7
Not Eligible	144	1.4
Total	10462	100.0

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