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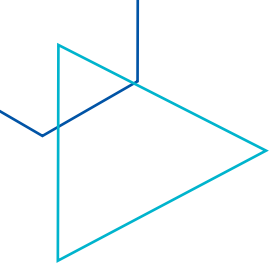
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HIGHLIGHTS: FIRST WAVE NOVEMBER 2020

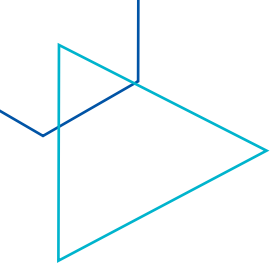
Rapid Labour Force Survey On the Impact of COVID-19 in Tunisia

Published in February 2021



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Introduction

This report provides a summary of the key findings of the first wave of rapid labour force surveys conducted by ILO and ERF in November 2020, to monitor the impact of COVID-19 on households, household enterprises and farmers in Tunisia. This is part of a series of panel surveys that track the evolution of the pandemic on Morocco's labour market. The survey estimates retrospectively a baseline pre-COVID situation (in February 2020) and measures key indicators for the week or month preceding its roll-out. The survey was conducted by phone on the basis of 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

► Unemployment within the surveyed population increased by 33 per cent (going from 9 per cent to 12 per cent) between February and October 2020. The lockdown has made job search more difficult or impossible in certain cases; when dropping the job-search condition to count unemployment, as many as 38% qualify as unemployed.

► Informal waged workers were 3 times more affected by job losses than formal waged workers. Unemployment rates have increased significantly more among men than among women. Rising unemployment affected individuals across educational divides, with increments of 33 per cent, 36 per cent, and 33 per cent for individuals with tertiary education, basic education and less than basic education, respectively. Those with secondary

education have been less affected.

► In the last 60 days prior to the survey, 32 per cent of waged workers experienced temporary layoffs and 13 per cent were permanently laid off because of COVID-19 or related restrictions.

► More than half (51 per cent) of surveyed households reported decreased incomes since February 2020. Incomes decreased by more than 25 per cent among 38 per cent of households.

► 30 per cent of male and 28 per cent of female wage workers saw their working hours reduced, and respectively 22 and 17 per cent saw their wages reduced during the period. Waged workers with lower levels of education are the group most affected by the decrease in working hours and wages.

► More than three-quarters of households

reported having had to reduce their food purchase given price increases (79 per cent) or decreased incomes (75 per cent). Using up savings and getting help from in-country relatives and friends were the main coping strategies used by households in the face of COVID-19.

► Only 14 per cent of waged workers are able to work from home.

► 5 per cent of enterprises that were in business in February were reported to have permanently shut down by November; 23 per cent temporarily suspended their operations, and 46 per cent reported having reducing their working hours. Only 24 per cent of businesses have reported being able to operate without significant changes.

► Government supported business loans are the most commonly cited form of public support required by entrepreneurs.

The COVID-19 pandemic in Tunisia and policy responses

Following the 2011 revolution, the Tunisian economy has gone through a difficult transition, compounded by instability in Libya. In 2019 The COVID-19 crisis has deepened preceding economic and social challenges, including low growth (just 1 per cent in 2019), high unemployment and large budget and current accounts deficits.¹

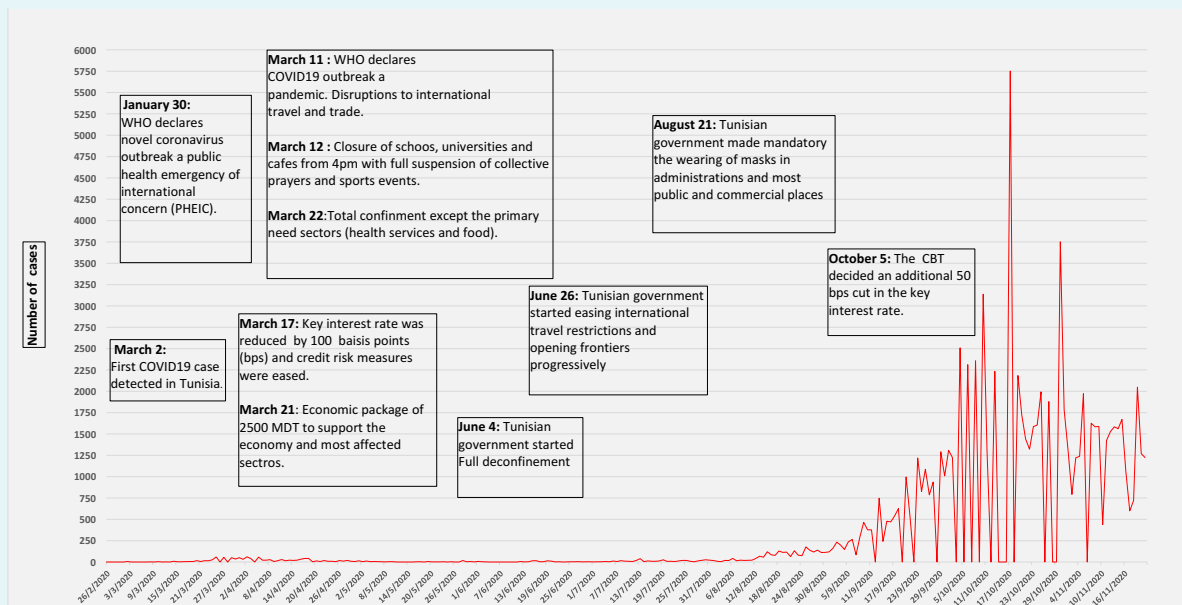
Tunisia reported its first coronavirus case on 2 March 2020. The spread of the virus remained relatively subdued in the following weeks thanks to the Tunisian Government's proactive response. By mid-March, it had declared a national public health emergency, adopted a number of sanitary and confinement measures, closed schools and universities and suspended collective prayers and sporting events. A strict lockdown was imposed by 22 March, with movements limited to work and to essential needs (health and food). The rollback of the lockdown started in June 2020 and a sharp increase in the number of detected cases was observed by September 2020 (Figure 1). By November 2020, new restrictions were imposed, such as the wearing of masks in most public and commercial areas, but the Government refrained from imposing another strict lockdown.

As part of Tunisia's economic and social response, the Central Bank (CBT) reduced its key interest rate by 150 basis points and eased credit risk measures. The CBT requested that banks defer payments on existing loans and suspend any fees for electronic payments and withdrawals. In addition, the CBT asked banks to postpone loan reimbursement by households for a period of three to six months, depending on the net revenue level. On the fiscal side, the Government of Tunisia announced a TND 2.5-billion (US\$928-million) emergency plan on 21 March 2020, including value-added tax (VAT) exemptions, the rescheduling of taxes and custom arrears, and liquidity easing measures. Cash transfers for low-income households, disabled and homeless persons were introduced to the tune of TND 450 million for three months. Special unemployment benefits were also made available for an amount of TND 300 million.



¹ EMNES. 2020. "Covid-19 in the Mediterranean and Africa - Diagnosis, Policy Responses, Preliminary Assessment and the Way Forward." April.

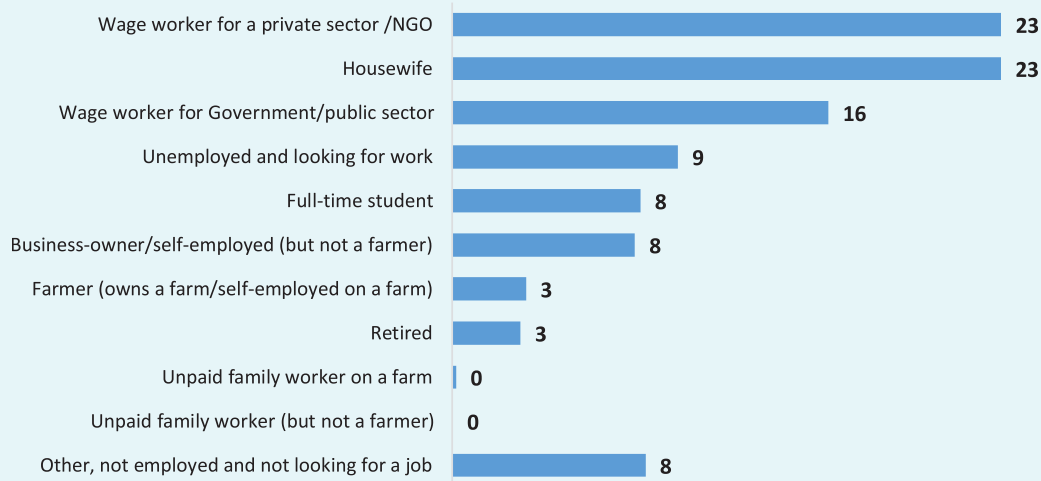
► **Figure 1: COVID-19 case trends in Tunisia and government response**



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

Figure 2: illustrates the distribution of Tunisian participants in the 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**

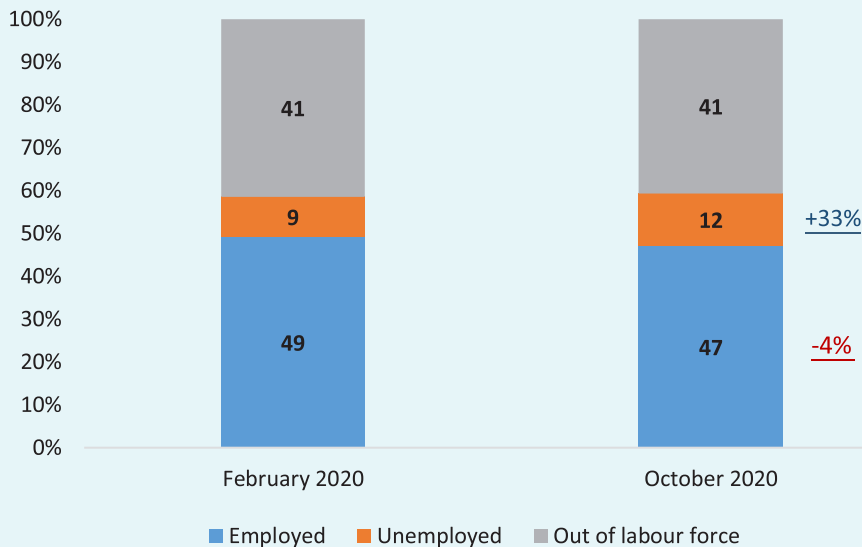


Source: Constructed by authors using the ERF COVID-19 Monitor.

► Employment and unemployment

Unemployment ² in the surveyed population increased by 33 per cent of the working age population between February and October 2020 (Figure 3). The unemployment rate rose from 13 per cent to 22 per cent (with the labour force in the denominator, Figure 6). Labour force participation remained stable at 41 per cent of the working age population.

► **Figure 3:** Percentage change in labour force status, February–October 2020



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

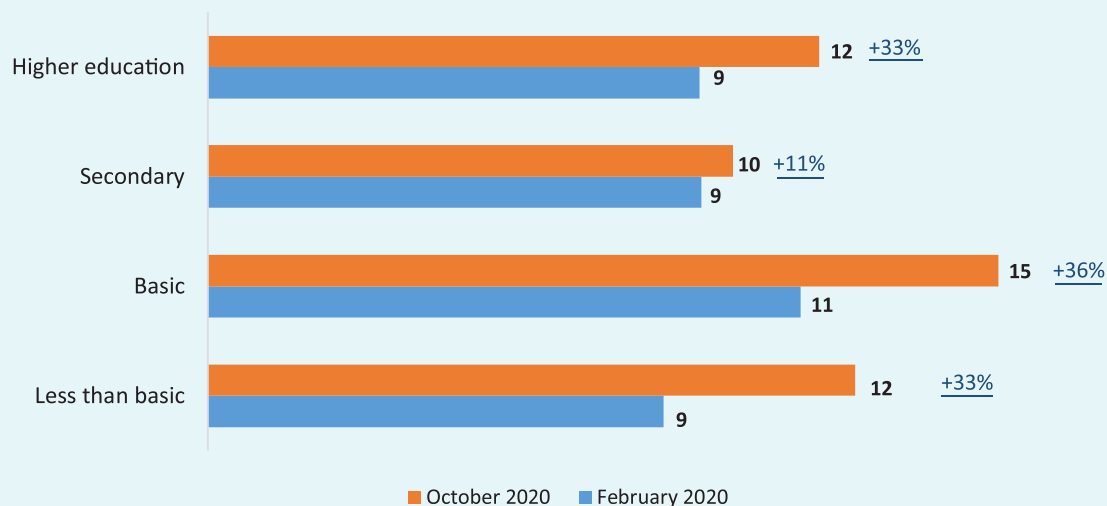
Note: Unemployment was measured using direct questions about respondent's job search activity in February and October 2020, without further investigation about whether respondents actually searched for a job.

Individuals with secondary education were affected less than all other segments of educational attainment (Figure 4). Unemployment increased more abruptly among men (+41 per cent) than among women (+11 per cent) (Figure 5).



² The ERF COVID-19 Monitor survey covered three reference periods in measuring employment and unemployment rates. The first is pre-COVID, prior to February 2020; the second is one month prior to the survey (October 2020); and the third is one week prior to the survey. Comparable indicators are based on the measurement, so February 2020 and October 2020. Current status indicators are based on the one-week reference period.

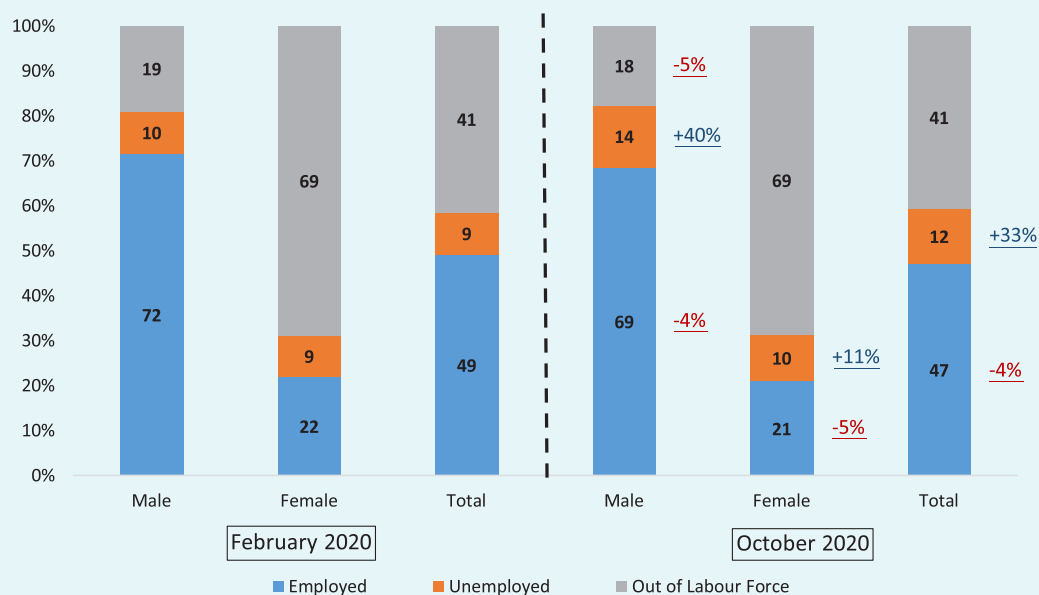
► **Figure 4:** Percentage change in unemployment, by educational attainment, February–October 2020



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

Note: The sample represents the target population, which is the mobile phone owners (users) 18-64. In Tunisia, less educated females are less likely to have mobile phones and are less likely to be unemployed, while unemployment rate tends to be higher among educated females who are more likely to own mobile phones. The estimated unemployment rate in this report reflects this population.

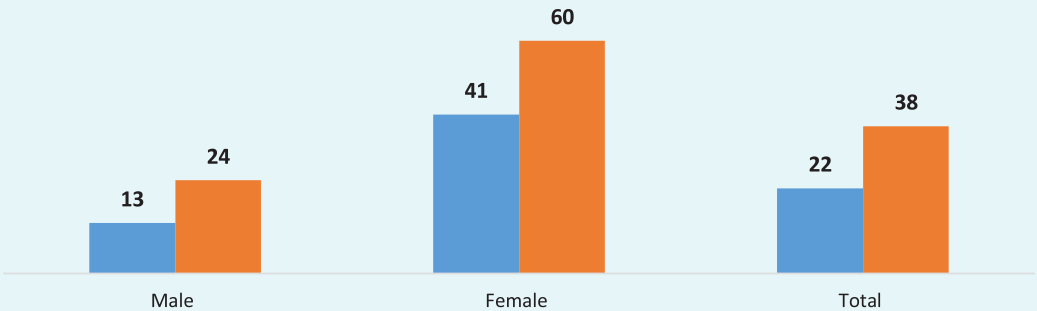
► **Figure 5:** Percentage change in labour market status, by sex, February–October 2020



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

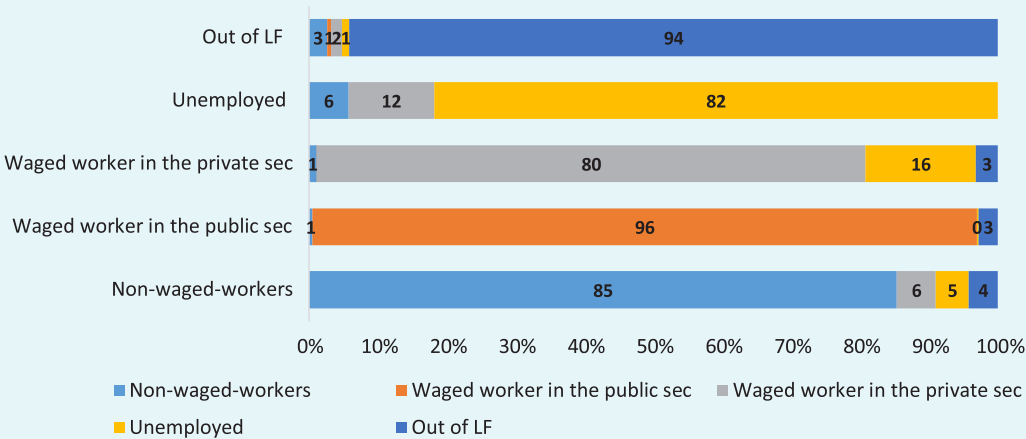
The lockdown has made job-search more difficult or impossible in certain cases; when dropping the job-search condition to count unemployment, as many as 38% qualify as being unemployed (Figure 6). 82 per cent of the unemployed in February remained unemployed, and 16 per cent of private waged workers became unemployed. The public sector remained more protected (Figure 7).

► **Figure 6:** Unemployment rates by sex in November 2020, standard definition (left) and including those not actively searching (right) (%)



Source: Constructed by authors using the ERF COVID-19 Monitor .
 Note: Measured for the week prior the survey.

► **Figure 7:** Labour market transition³, February–October 2020 (situation of working age individuals in October as per their situation in February)



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

³ Non-waged-workers include the self-employed (28 per cent), employers/self-employed (70 per cent), and unpaid family workers (2 per cent).

Informal waged workers were 3 times more affected by job losses in October 2020 than formal waged workers (Figure 8).

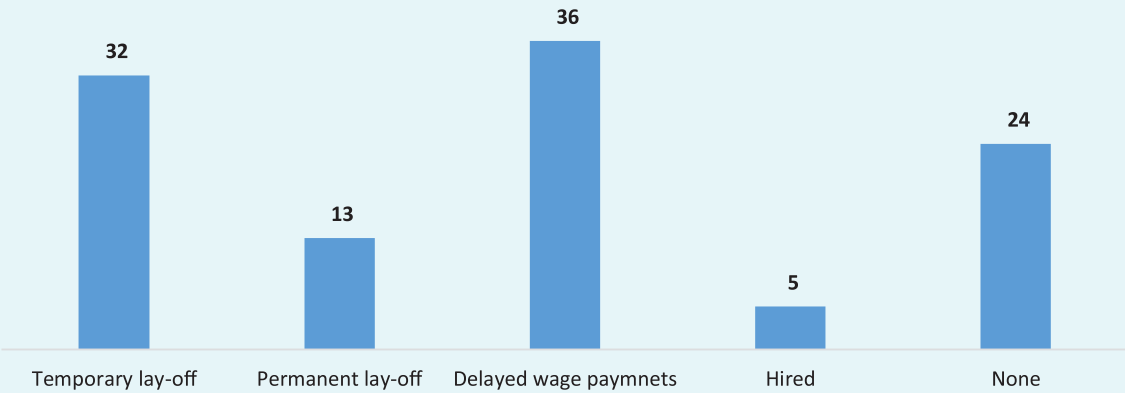
► **Figure 8:** Labour market transition, by formality⁴, February–October 2020 (situation of working age individuals in October as per their situation in February)



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

32 per cent of those who were in wage work in February had been temporarily laid off by October 2020, and an additional 13 per cent were permanently laid off. In addition, more than one-third of waged workers experienced delays in receiving their wages (Figure 9).

► **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 ERF COVID-19 Monitor.

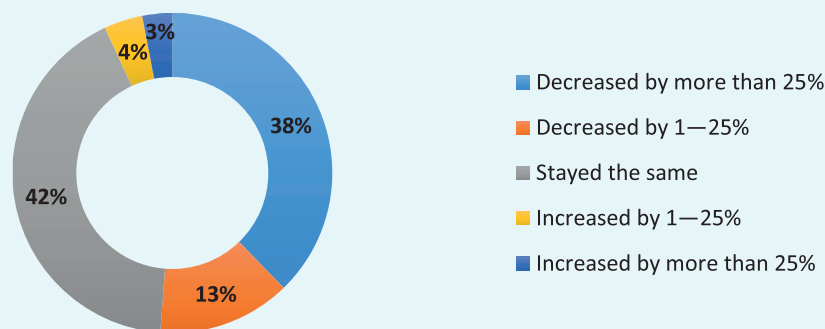
Note: Multiple answers were allowed.

⁴ Formality is defined by having social insurance.

► Wages and income

More than half of the surveyed respondents reported a decrease in their household income since February 2020. 38 per cent of respondents lost more than 25 per cent of their incomes (Figure 10).

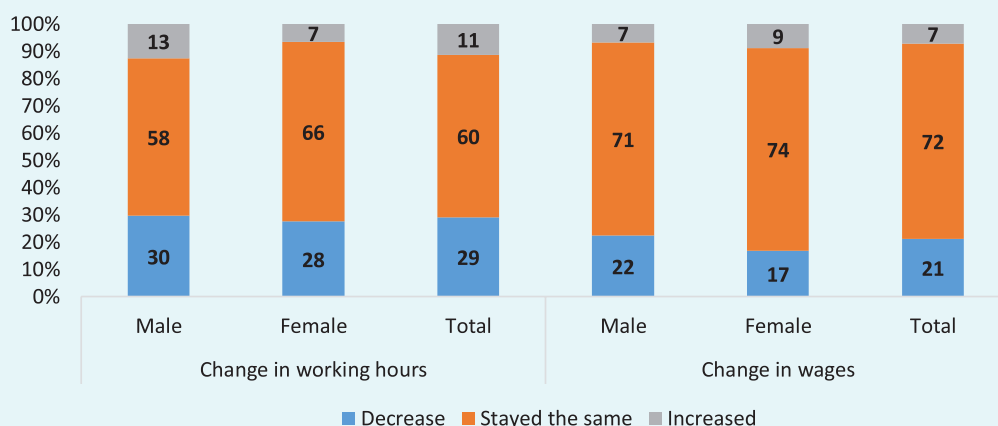
► **Figure 10:** Households' total monthly income change, compared to February 2020



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

Waged workers have faced important reductions in both their working hours and their wages⁵ since February 2020. 30 per cent of male and 28 per cent of female wage workers saw their working hours reduced, and respectively 22 and 17 per cent saw their wages reduced (Figure 11). Waged workers with lower levels of education are the group most affected by the decrease in working hours and wages (Figure 12, Figure 16).

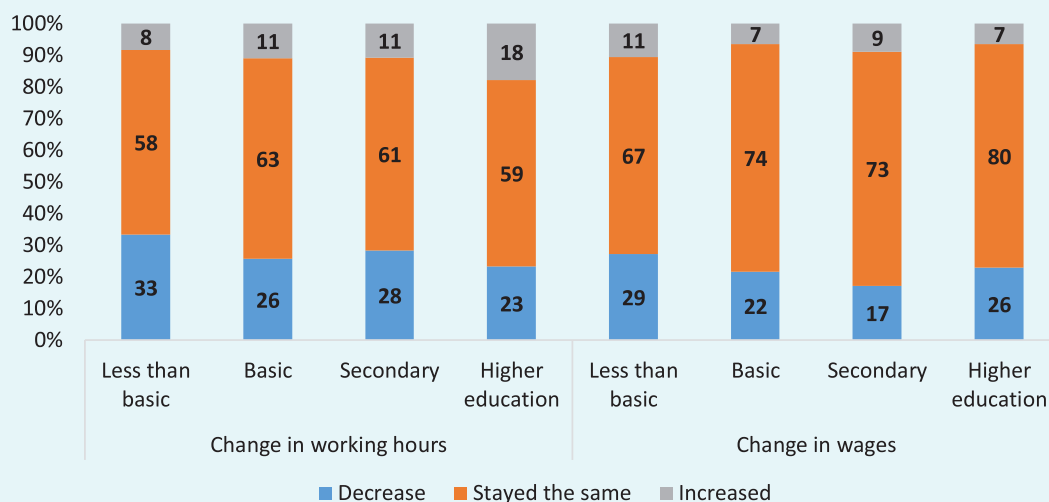
► **Figure 11:** Changes in wages and working hours, February–October 2020, by sex



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

⁵The change in wages is computed only for those who have remained waged workers since February 2020.

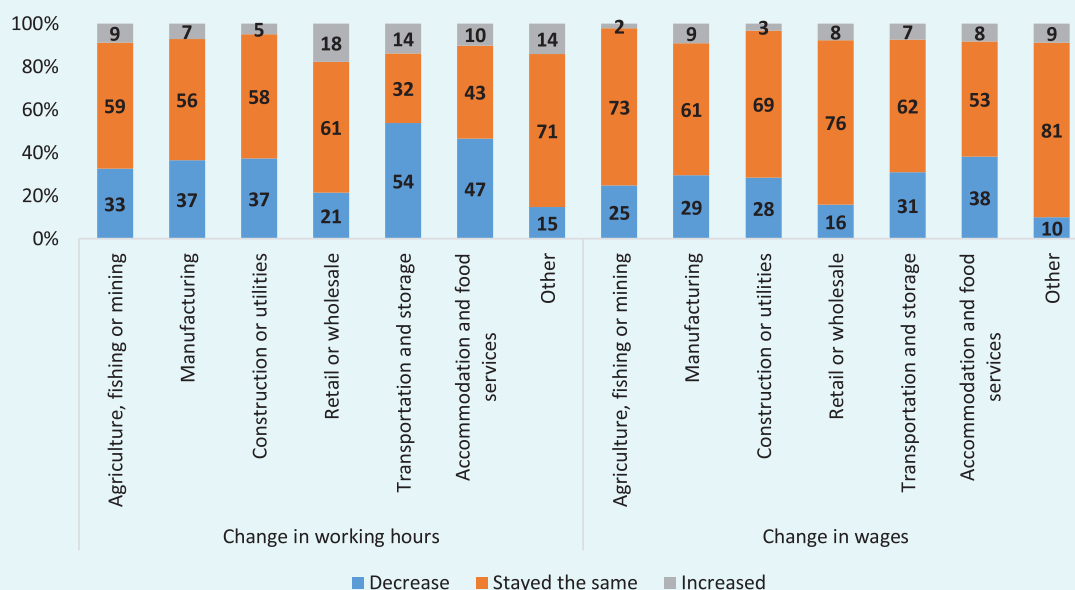
► **Figure 12:** Changes in wages and working hours, February–October 2020, by educational attainment



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

Workers in the accommodation sector have been most affected by wage reductions. The impact of the pandemic has spread widely to workers across other sectors, as over 25 per cent of workers in agriculture, manufacturing, construction and transportation have suffered wage reductions (Figure 13). Waged workers in the accommodation, construction and retail saw their wages decrease by 28 per cent, 27 per cent and 12 per cent on average respectively (Figure 16).

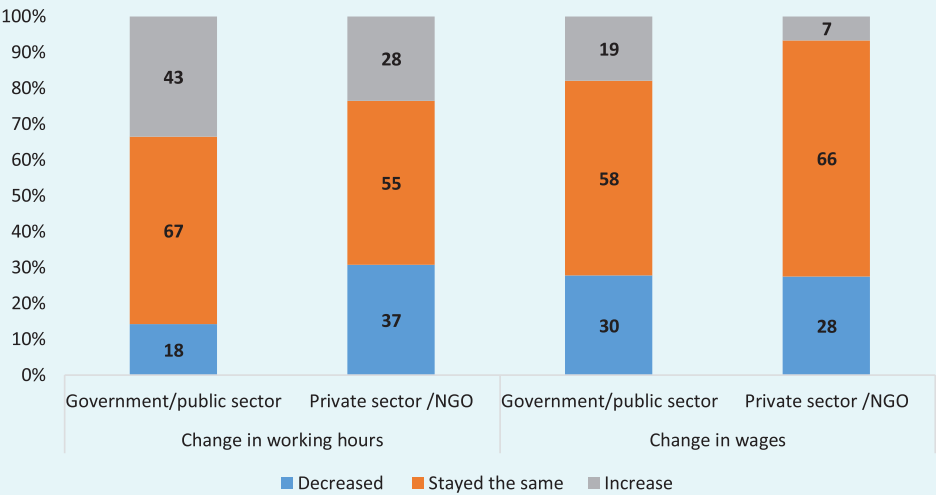
► **Figure 13:** Changes in wages and working hours, February–October 2020, by economic activity



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

37 percent of waged workers in the private sector reported a decrease in working hours, compared to 18 per cent for those who work in the public sector. Regarding changes in wages, almost a third of both public sector waged workers and private sector wage workers saw a decrease in their wages (Figure 14). However, the average percentage change in wages was more pronounced for private sector waged workers (-11 per cent) than those who work for the public sector (-2 per cent), as shown in Figure 16.

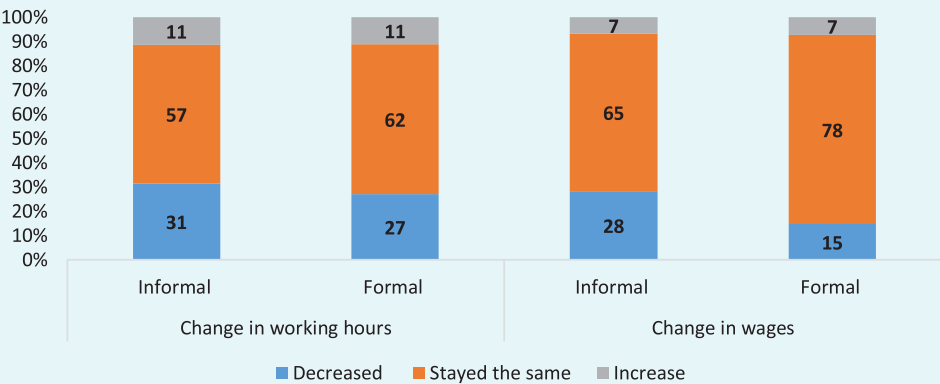
► **Figure 14:** Changes in wages and working hours, February–October 2020, by sector type



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

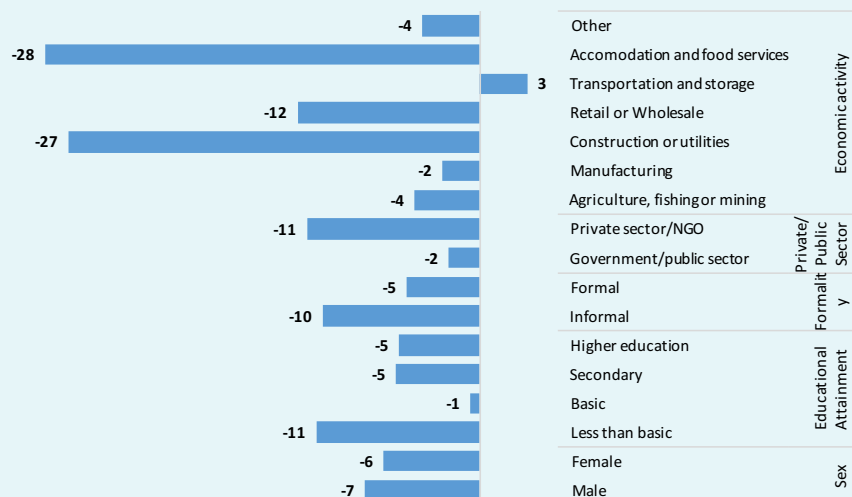
Informal workers were more ungarded against the COVID-19 repercussions. Data in Figure 15 shows that 28 per cent of informal workers witnessed wage reduction, compared to 15 per cent with respect to formal waged workers. Moreover, the wage reduction magnitude was 2 times higher in informal sector (-10 per cent) than in the formal one (-5 per cent), as indicated in Figure 16.

► **Figure 15:** Changes in wages and working hours, February–October 2020, by formality



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

► **Figure 16:** Average percentage change in wages by sex, educational attainment, formality, sector type and economic activity (%)



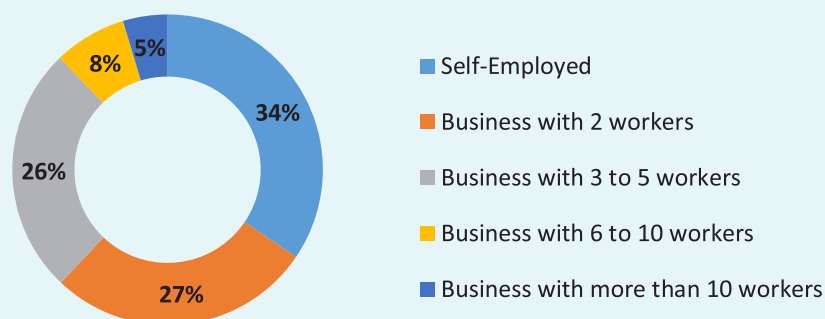
Source: Constructed by authors using the ERF COVID-19 Monitor

Note: Changes in wages are calculated using the reported wages in February and October 2020; even those reported zero wage in October 2020, after excluding the highest 1%.

► Entrepreneurs and small businesses

In our sample around one third of businesses are owned by a self-employed individual and over 90 per cent employ 5 workers or less (Figure 17).

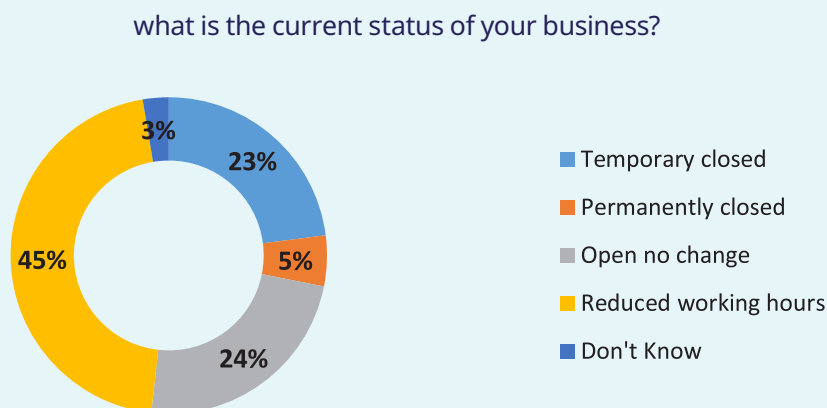
► **Figure 17:** Percentage distribution of enterprises, by number of workers in February 2020



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

Only 24 per cent of businesses surveyed reported no significant changes in their activity. 5 per cent of businesses that were open in February are now reported permanently closed, 23 per cent are reported temporarily closed and another 46 per cent are reporting reduced hours of work (Figure 18).

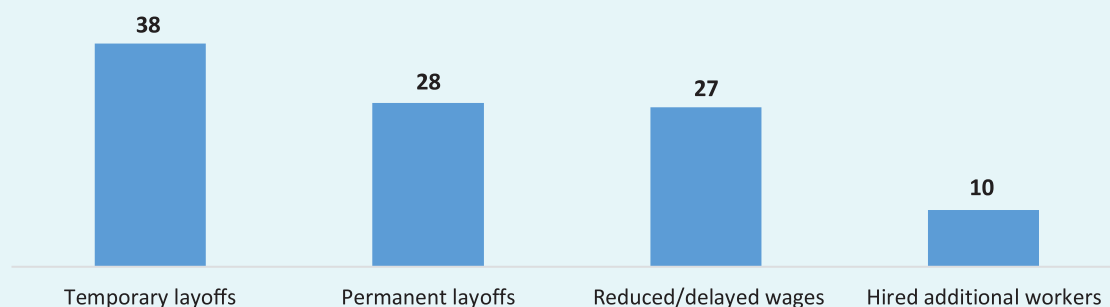
► **Figure 18:** Percentage distribution of enterprises' current status



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

Among employers, 38 per cent had to temporarily layoff some of their workers and 28 per cent had to permanently layoff some of their workers (Figure 19).

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



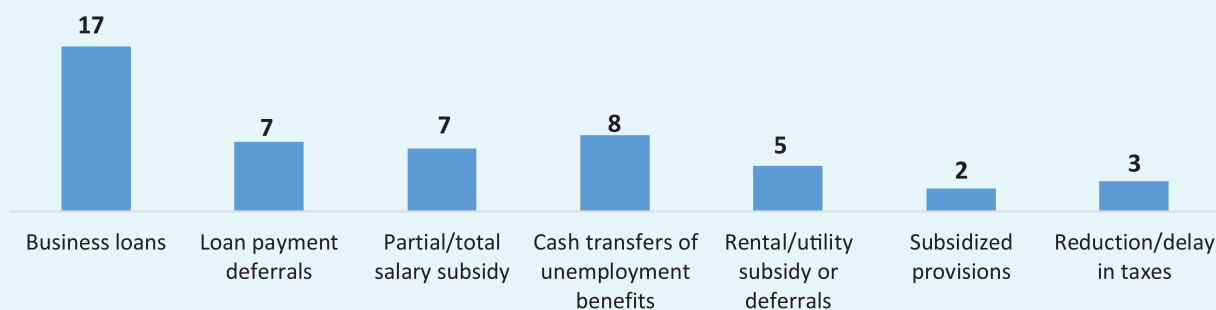
Source: Constructed by authors using the ERF COVID-19 Monitor

Note: Changes reported only for employers.

Of all surveyed households that indicated owning a business, only 27 per cent said they had applied for or are currently receiving support ⁶ from the Government. Special lending programmes are the mostly commonly used and required form of business support (Figure 20, Figure 21), but range of other measures are also called for.

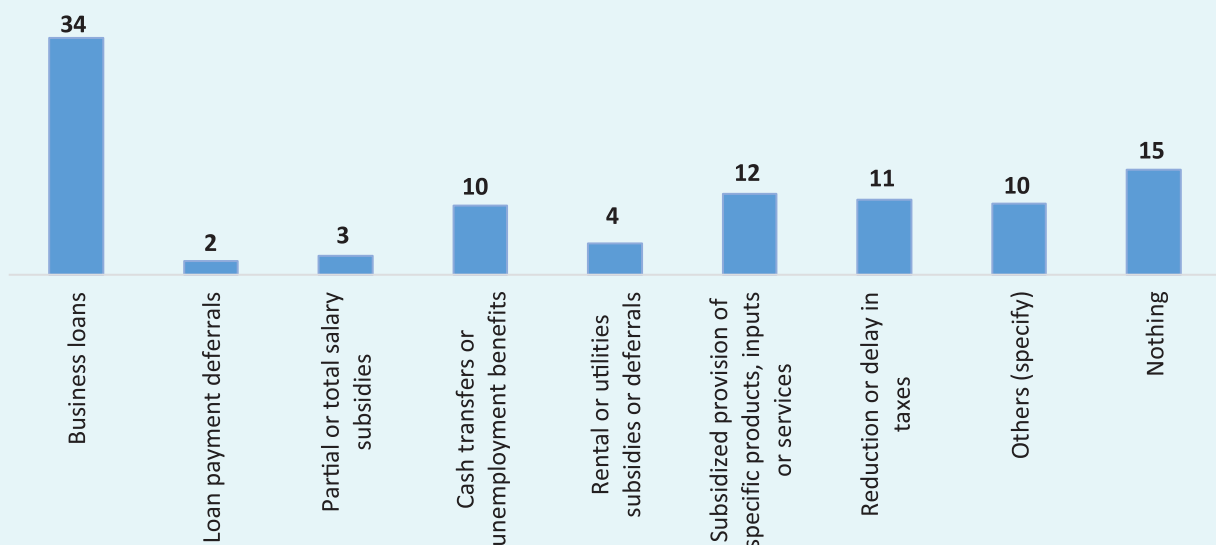
⁶ Multiple answers are allowed.

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



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

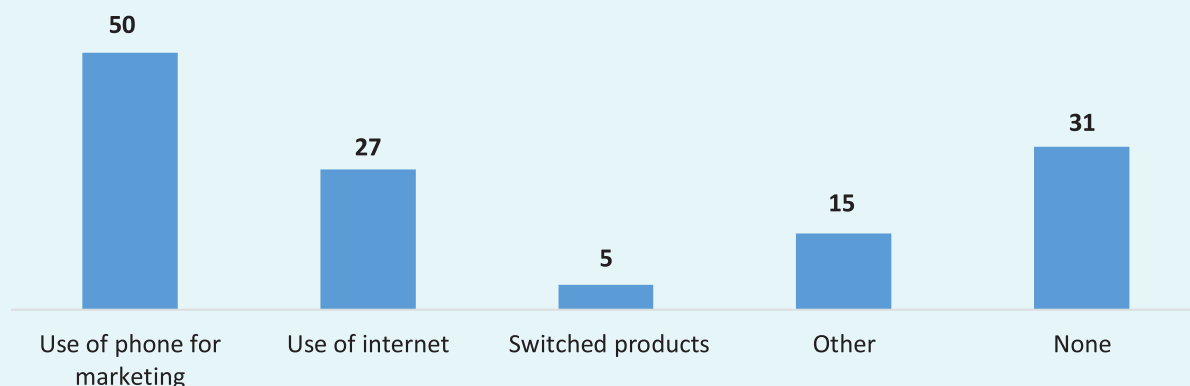
► **Figure 21:** Employers' or business-owners' most-requested policy support for COVID-19 (%)



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

The use of phone marketing and of the internet were the two main strategies adopted by businesses to comply with social distancing measures and reduce direct physical proximity with customers (Figure 22).

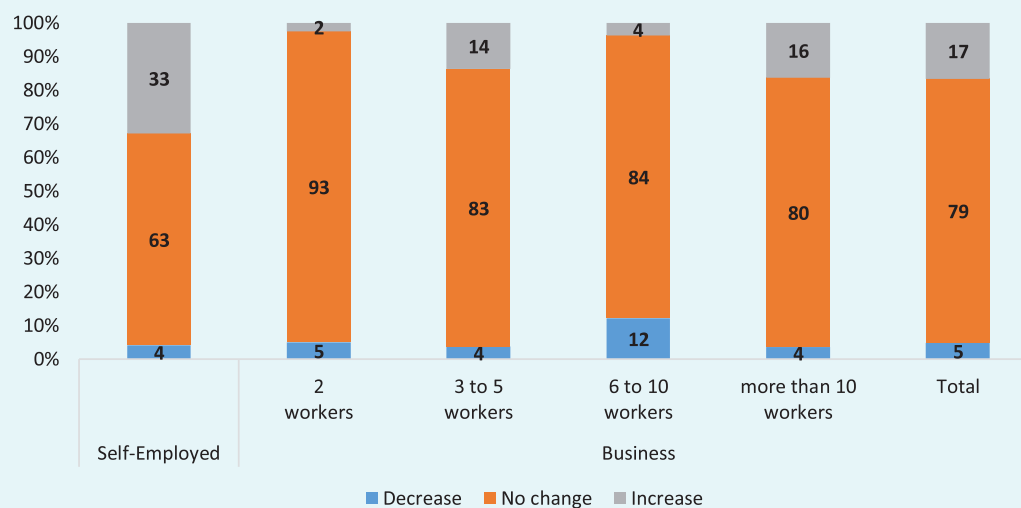
► **Figure 22:** Businesses' strategies to reduce direct physical proximity with customers (%)



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

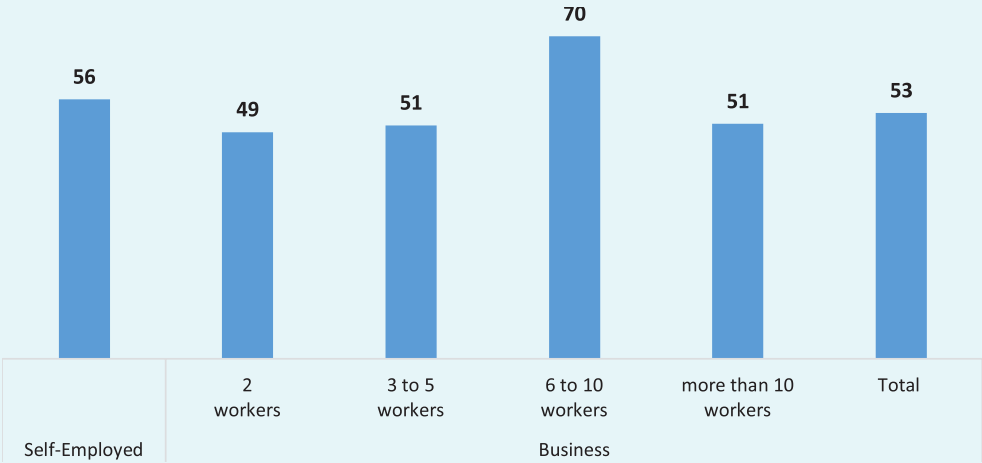
When asked to compare enterprises' sales in the last two months prior to the survey with the same period a year earlier, 79 per cent of respondents said their sales had fallen by more than half (Figure 23, Figure 24). In addition, most said they believed sales would decrease in 2020 compared with 2019 (Figure 25).

► **Figure 23:** Average change in sales/revenue in the last 60 days compared to your sales/revenue in the same period last year, by enterprise size



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

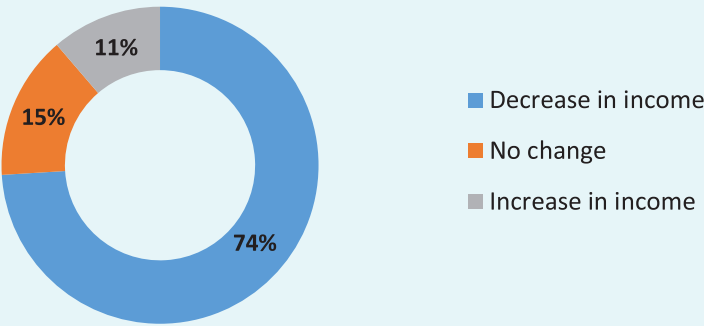
► **Figure 24:** Average percentage decrease in sales/revenue reported by enterprises, by enterprise size



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

► **Figure 25:** Sales expectations for 2020 compared to 2019

In 2020, how much lower/higher do you expect your business total sales to be, compared to 2019?

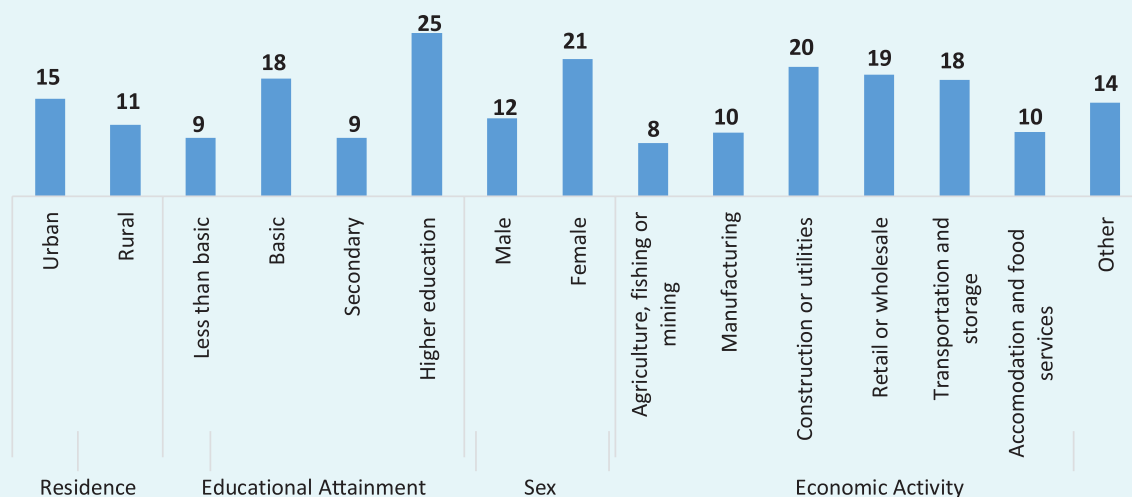


Source: Constructed by authors using the ERF COVID-19 Monitor

► Shift to online and home-based work

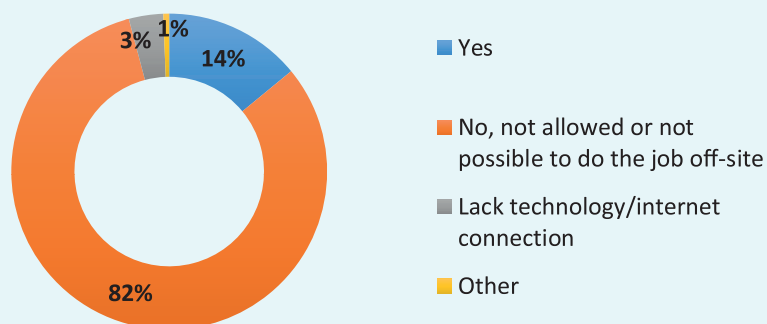
Only 14 per cent of the waged workers surveyed in Tunisia said they are able to work from home, while for 82 per cent, work off-site/from home is not feasible due to the nature of their jobs (Figure 27). The percentage of those able to work from home increases among the highly educated and urban residential waged workers (Figure 26).

► **Figure 26:** Ability to work from home, by residence, sex, educational attainment, economic activity (%)



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

► **Figure 27:** Ability to work online

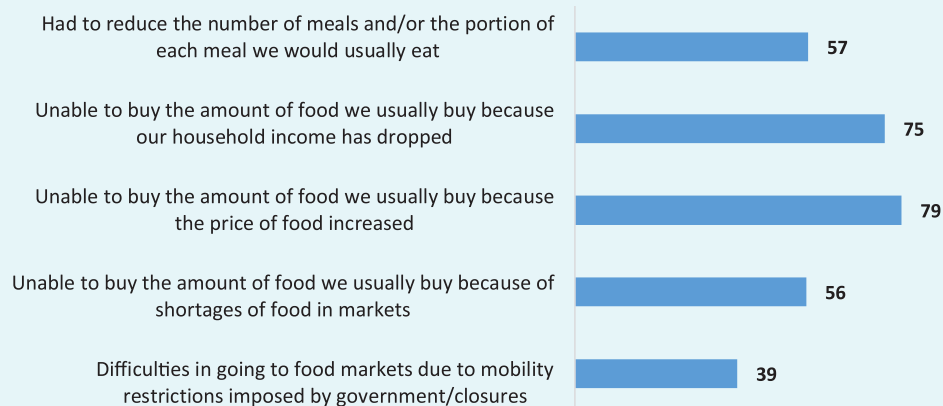


Source: Constructed by authors using the ERF COVID-19 Monitor

► Have you had to...? Obstacles and household coping strategies

During the last seven days prior to the survey, 79 per cent of respondents mentioned that their households were not able to buy the usual amount of food because of the increase in food prices and 75 per cent because of reduced incomes. In addition, 56 per cent reported that they had to reduce the amount of food they usually eat (Figure 28). These obstacles were more common among respondents with lower levels of education.

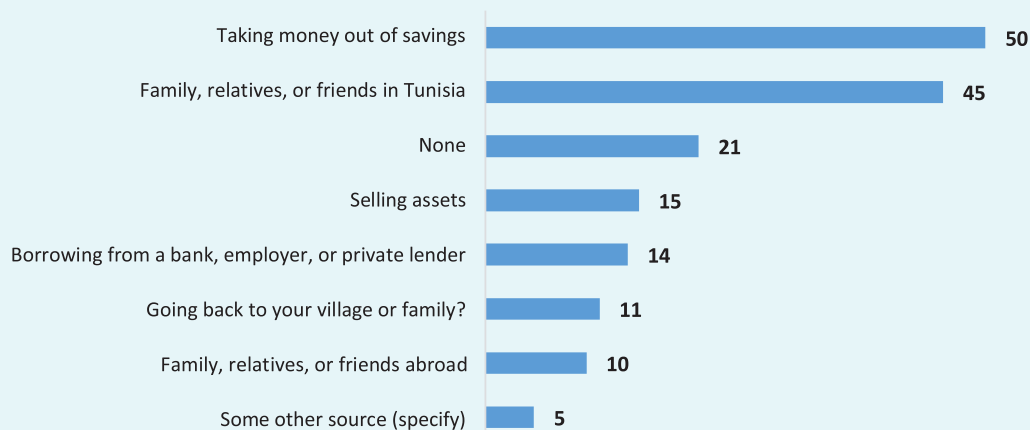
► **Figure 28:** Food security: In the past 7 days, have you or any household member experienced any of the following? (%)



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

In order to face these obstacles, half of households had to use their savings or had to turn to their friends and relatives for help (Figure 29).

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



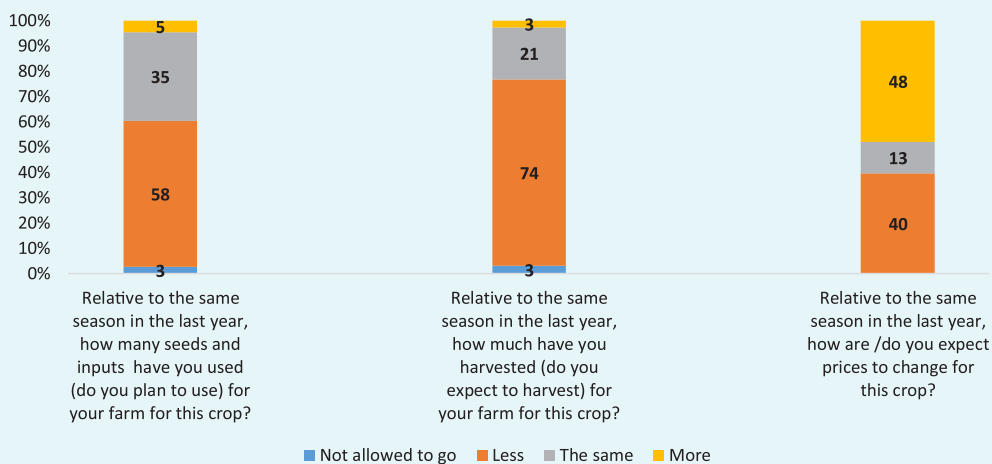
Source: Constructed by authors using the ERF COVID-19 Monitor

Around only 4 per cent of survey respondents reported receiving governmental support while 7 per cent received non-governmental support. The proportion of those receiving social assistance is correlated with educational attainment the percentage of support recipients receive increases among those with lower levels of education.

Farmers

COVID-19 has also had a negative impact on farmers, who constituted only 3 per cent of the respondents. Most of the farmers surveyed said they had to use fewer seeds and inputs than they had used during the same season the previous year (58 per cent), and most did harvest (or expect to harvest) less this year (74 per cent). While 48 per cent said they are expecting an increase in crop prices, two-fifths said they are not optimistic and are expecting a drop in prices (Figure 30).

► **Figure 30:** Difficulties farmers faced since February 2020



Source: Constructed by authors using the 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 Tunisia.

The sample for the household survey were mobile phone users aged 18–64. Random digit dialing 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 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 operator for individuals (individual weight) and household members (household weight and household member weight)
- Representative data with comparable demographic and household characteristics to weight for non-responses

Around 14,300 random number were generated, of which one third were not in service. The total sample size of those who completed the survey was 2,000.

Phone calls outcomes

Tunisia	Count	%
Phone disconnected/ busy Try for up to 3 times	3,783	26.4
Not in service	4,943	34.5
Did not answer/ try for up to 3 times	1,547	10.8
Picked up and refused	1,117	7.8
Incomplete, and refused	493	3.4
Incomplete and call returned (try for up to three times)	76	0.5
Complete	2,000	14.0
Not Eligible	366	2.6
Total	14,325	100

► **Table A 1:** Changes in working hours, February–October 2020, by sex, educational attainment, economic activity, sector type and formality

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%	21%	58%	8%	4%
	Female	17%	10%	66%	6%	1%
Educational Attainment	Less than basic	7%	26%	58%	8%	0%
	Basic	14%	11%	63%	10%	1%
	Secondary	15%	13%	61%	8%	2%
	Higher education	12%	11%	59%	5%	13%
Economic Activity	Agriculture, fishing or mining	6%	27%	59%	8%	1%
	Manufacturing	18%	19%	56%	7%	0%
	Construction or utilities	10%	27%	58%	5%	0%
	Retail or Wholesale	6%	16%	61%	9%	9%
	Transportation and storage	8%	45%	32%	8%	6%
	Accommodation and food services	23%	23%	43%	9%	1%
	Other	9%	6%	71%	9%	6%
Sector type	Government/public sector	7%	12%	67%	7%	8%
	Private sector/NGO	13%	23%	55%	8%	1%
Formality	Informal	12%	20%	57%	11%	0%
	Formal	10%	17%	62%	5%	6%

► **Table A 2:** Changes in wages, February–October 2020, by sex, educational attainment, economic activity, sector type and formality

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%	14%	71%	6%	1%
	Female	7%	9%	74%	9%	0%
Educational Attainment	Less than basic	8%	18%	67%	7%	0%
	Basic	14%	8%	74%	4%	0%
	Secondary	12%	8%	73%	6%	1%
	Higher education	4%	8%	80%	6%	2%
Economic Activity	Agriculture, fishing or mining	4%	21%	73%	2%	0%
	Manufacturing	11%	19%	61%	9%	0%
	Construction or utilities	10%	18%	69%	3%	0%
	Retail or Wholesale	5%	11%	76%	7%	1%
	Transportation and storage	22%	9%	62%	6%	1%
	Accommodation and food services	29%	9%	53%	8%	0%
	Other	2%	8%	81%	8%	1%
Sector type	Government/public sector	1%	8%	80%	9%	1%
	Private sector/NGO	13%	16%	66%	5%	0%
Formality	Informal	9%	19%	65%	7%	0%
	Formal	8%	7%	78%	6%	1%

► **Table A 3:** Average change in wages by sex, educational attainment, formality, sector type, economic activity

Main Characteristics		Average change in wages in Dinar	Average percentage change in wages (%)
Sex	Male	-128	-7%
	Female	-861	-6%
Educational Attainment	Less than basic	-283	-11%
	Basic	-264	-1%
	Secondary	-247	-5%
	Higher education	-290	-5%
Economic Activity	Agriculture, fishing or mining	-58	-4%
	Manufacturing	-661	-2%
	Construction or utilities	-406	-27%
	Retail or Wholesale	-325	-12%
	Transportation and storage	-218	3%
	Accommodation and food services	-1061	-28%
	Other	-37	-4%
Sector type	Government/public sector	-20	-2%
	Private sector/NGO	-483	-11%
Formality	Informal	-484	-10%
	Formal	-116	-5%

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