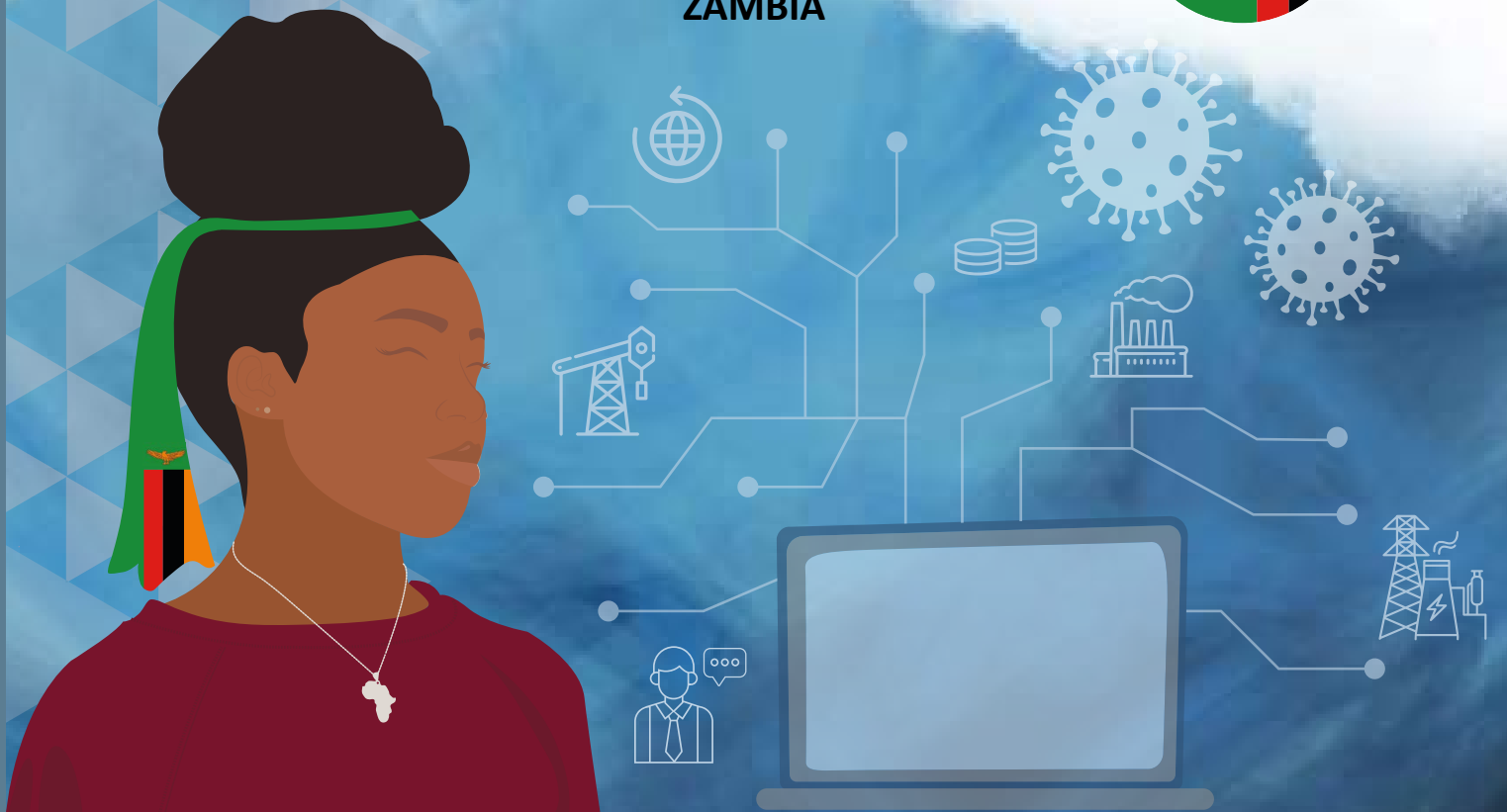


SIFA
Skills Initiative
for Africa

TC
Technical Cooperation

RAPID ASSESSMENT OF SKILLING AND RESKILLING NEEDS ARISING FROM THE EFFECTS OF COVID-19

ZAMBIA



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The SIFA Programme aims at improving the employment prospects of young Africans by providing technical support to improve the responsiveness and employment orientation of skills development programmes. The SIFA action seeks to create stronger continental dialogue platforms for learning and sharing of best practices and facilitating conditions for mutual recognition of qualifications. SIFA specific objective is it to strengthen the capacity of labour market and skills development players to provide evidence-based policy and programme advice on Technical, Vocational and Education and Training (TVET).

This rapid assessment was conducted under the overall direction of Dr. John Musabayana, ILO Director for the Decent Work Team for Eastern and Southern Africa, and for the ILO Country Office for Botswana Eswatini, Lesotho, and South Africa and Dr Ibrahim Mayaki. the Chief Executive Officer of the African Union Development Agency (NEPAD).

The SIFA – Skills Anticipation Project wishes to acknowledge the professional work done by the authors of this report, Mr. Abraham Makano and Mr. Edward Chibwili for their professional work. The Project also wishes to thank all stakeholders who provided valuable feedback and inputs to the report and who participated in the validation of the survey findings and recommendations. Appreciation goes to Ms Unami Mpofu of AUDA-NEPAD for her inputs and guidance during the report validation workshop.

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Naomy Kanyemba Lintini

Chief Technical Adviser
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FOREWORD

The scale of economic and social effects of the COVID 19 pandemic has been unprecedented. The pandemic has caused massive labour market disruption and is reshaping the world of work and the way we socialise.

In Zambia, the pandemic exposed already existing vulnerabilities and revealed how precarious and interdependent economic sectors are as disruptions resulting from the COVID 19 pandemic swept across all sections of society. Youth, women and other vulnerable groups were among those adversely affected by the socio-economic impact of the pandemic. In this regard, the pandemic exacerbated an already existing unemployment and social protection challenge.

In keeping with the need to provide a speedy response to the devastating impact of COVID-19 on the labour market, the ILO developed a Guidance Note on conducting rapid skills surveys that can help Countries to assess the reskilling and upskilling needs needed for economy recovery of the affected sectors of the economy.

Dr Ibrahim Mayaki

Chief Executive Officer

African Union Development Agency (AUDA-NEPAD)

Under the auspices of the Skills Initiative for Africa (SIFA), the ILO support the Country to conducted a rapid skill assessment of the impact of the COVID 19 pandemic on the mining, manufacturing, energy, tourism, and education and training sectors of Zambia.

This report presents the findings for the rapid assessment. It concise, to-the-point, and provides a clear analysis of the situation whilst also providing practical recommendations that can help to limit the career scarring effects of the pandemic on workers through provision of skilling and reskilling, measures. The report also provides skills related actionable recommendations for the economic recovery of the companies in the subsectors that were assessed.

The ILO and the African Union Development Agency (AUDA) look forward to supporting the Zambian government and its social partners to mobilise follow up action on the report recommendations.

Dr. Joni Musabayana

Director

International Labour Organization

Decent Work Team for Eastern and Southern Africa

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► ABBREVIATIONS AND ACRONYMS

GDP	Gross domestic product
ILO	International Labour Organisation
IPP	Independent Power Purchase
MCM	Mopani Copper Mines
PES	Public Employment Services
SIFA	Skills Initiative for Africa
SkiDRES	Skills Development for the Renewable Energy Sector
SMEs	Small and medium enterprise
ZESCO	Zambia Electricity Supply Corporation

▶ EXECUTIVE SUMMARY

Economic outlook: The economy of Zambia fell into a deep recession due to the adverse impact of the COVID-19 pandemic. Real gross domestic product (GDP) contracted by an estimated 4.9% in 2020, after growing by 4.0% in 2018 and 1.9% in 2019. The output contraction is the result of an unprecedented deterioration in all the key sectors of the economy.

Manufacturing output fell sharply as supply chains were disrupted, while the service and tourism sectors were hurt as private consumption and investment weakened due to measures taken to contain the spread of COVID-19. Mining output, which declined initially due to falling global demand for copper, is recovering amid production disruptions in South America. Sustained commodity price increases beyond the current forecast could lead to lower economic contraction.

Following the outbreak of COVID-19, inflation rose to 17.4% in 2020 and is projected to remain above the target range of 6%-8% in 2021. The external position also worsened in 2020, with dwindling reserves (averaging 1.6 months import cover) and will remain depressed in 2021 due to copper price and output fluctuations, rising public debt payments, and elevated non-oil imports. Although agriculture remains a small sector, it employs more than 2.9 million out of 5.9 million people.

The economy is projected to grow by 1.0% in 2021 and 2.0% in 2022, underpinned by a recovery in the mining, tourism, and manufacturing sectors. The recovery in international demand and copper prices are positive developments, while a reduction in COVID-19 cases will boost activity both in manufacturing and tourism. However, the economy

faces substantial risks that a second wave of the pandemic will impede global economic recovery and stifle demand for copper. A second wave could also undermine the revival of such critical sectors as tourism and manufacturing. Against this backdrop, poverty is expected to increase due to significant job losses in the service sector (on average, 30.6%), manufacturing (39%), personal services (39%), and tourism (70%).¹

Employment: Agriculture is the sixth largest (7.1% of GDP) sector. Wholesale and retail trade employs 690 000 people and is by far the largest sector, accounting for 22.6% of GDP, followed by mining (10.5%), construction (10.2%), and manufacturing (8.3%). Mining employs 82 000 people, construction 183 000, and manufacturing 234 000. Education is the fifth largest sector, accounting for 7.6% of GDP while employing more than 132 000 teachers, creating substantial formal employment. Zambia has 630 000 formally employed citizens, of which more than a third are in central and local government.²

Education and training: The impact of COVID-19 on the education and training sector was immediate, with schools and training institutions closed for over six months. The stakeholder consultations showed that most teachers and lecturers in private schools and higher institutions of learning were either laid off or put on half salary. The consultations also showed that the education and training sector must embrace technology during and after the COVID-19 pandemic.

¹ Country profile: Zambia. Accessed at <https://www.afdb.org/en/countries-southern-africa-zambia>.

² Ibid.

Occupational health and safety: Skills training for occupational health and safety should be implemented to minimise the risks of spreading the virus among teachers, learners, and visitors in the school environment through measures such as wearing of face masks, social distancing, cleaning facilities, washing hands, and temperature and symptoms checks.

E-learning: Skills training for e-learning should be given to all managers, teachers, and learners to enable them to take advantage of this medium. All teachers should be trained to deliver teaching and learning activities online.

Digital migration: Schools should be equipped with the appropriate hardware and software to enable a transition to e-learning platforms. Since many learners do not have access to internet connectivity, computers and tablets, provision should be made for learners to access e-learning in the school.

Accessibility: Government should create facilities for learners from underprivileged households and rural areas to access the internet.

Energy sector: Power generation and electricity distribution were affected by the pandemic, although the impact was less on the retail of solar products and liquified petroleum products. Some parts of the energy value chain halted due to infections and

workplace restrictions which affected productivity. Casual workers were most vulnerable and job losses for this group were severe, especially in hydropower plants.

COVID-19 health and safety protocols: Skills training for the application of COVID-19 health and safety protocols should be implemented to minimise the risks of spreading the virus in the workplace setting through measures such as wearing of face masks, social distancing, cleaning facilities, washing hands, and temperature and symptoms checks.

Training: Employees should be given customer service and communication skills training to improve service delivery.

Emerging energy enterprises: Small emerging service providers in the energy sector should be given enterprise development and entrepreneurship skills training in areas such as marketing, personal selling, digital technology, effective communication, and basic financial management.

Re-hire casual workers: Casual workers should be re-hired as business activity increases and offered technical skills training for employability and entrepreneurship.

Manager training: Senior managers should be trained in risk management to avoid future disruptions.

Manufacturing: All enterprise types ranging from large to micro businesses were severely affected by the crisis. The most affected were fabricators, woodworkers, builders, and electricians. In large companies, clerical workers and sales staff were also affected. Some large- and medium-sized manufacturing enterprises migrated to e-commerce platforms. Teleworking, remote learning, teleconferencing, and digital payments increased exponentially.

Mining: The mining sector was only mildly affected by the pandemic given that mining operations continued. Job losses were prevalent for casual and contract workers. Although some mines threatened to lay off workers, government intervention ensured that lay-offs were minimised.

COVID-19 health and safety protocols: As with the other sectors, skills training for the application of COVID-19 health and safety protocols should be implemented to minimise the risks of spreading the virus in the workplace setting through measures such as wearing of face masks, social distancing, cleaning facilities, washing hands, and temperature and symptoms checks.

Skills training: Skills training in the following is required in mining companies at various occupational levels:

- Digital skills (all levels)
- Communication (all levels)
- Decision-making (all levels)
- Design engineering (artisan, technician, professional)
- Time management (all levels)
- Productivity and quality (all levels)
- Maintenance scheduling (all levels)
- Project management (manager)
- Technical/artisan skills (electricians, mechanical fitters, boilermakers, and riggers)
- Supervisory skills (junior and middle management)

Tourism and hospitality: The tourism and hospitality sector was severely impacted by the pandemic. Hotels, lodges, bars, and tourist attractions were closed and in-bound tourism came to a halt. This resulted in massive job losses. Between December 2019 and March 2020, the sector lost around

US\$ 416 400 million in revenue and about 62 777 jobs. Attention should thus be paid to the changes in tourism products, the necessary safety concerns, as well as the proper reading of the trends of the sector.

Skills training in occupational health and safety: Skills training should be given to employees on government protocols for safe operating practices and new workplace standards, including infection prevention and hygiene control, in addition to skills training for the application of COVID-19 health and safety protocols to minimise the risks of spreading the virus in the workplace setting through measures such as wearing of face masks, social distancing, cleaning facilities, washing hands, and temperature and symptoms checks.

Digital skills training: There has been a swift migration of tourism and hospitality enterprises to e-commerce platforms. This trend has been accelerated with COVID-19. All employees in the sector should thus be trained to use digital skills in their work tasks, where possible.

Other tourism and hospitality skills training: Employees also require training in the following areas:

- Customer service
- Tour guiding
- Critical thinking, decision-making, and problem-solving
- Management
- Delivery of goods and services
- Occupational health and safety

Public Employment Services: The devastating effects of the COVID-19 pandemic on the labour market has highlighted the urgent need for putting in place policy measures and strategies for employment guarantees. Public Employment Services (PES) plays a critical role in matching work-seekers to jobs thereby reducing employment friction in the labour market. In the aftermath of the COVID 19 pandemic, public employment services can assist to systematically provide short-time work (STW) schemes which can be linked with the unemployment insurance system or special employment funds to partially cover subsidies for wages. This is especially important for first-time labour market entrants or for vulnerable workers. In Zambia, this service is offered by the local Labour Office that is situated in cities and towns. It plays a role in finding employment for contract and part-time workers.



1. Introduction

The COVID-19 pandemic is a global public health, economic, and labour market crisis. It has affected the global workforce of 3.3 billion and caused most economic sectors to decline, leading to unemployment and accompanying hardship. About 1.25 billion workers globally are at high risk of layoffs, wage reduction, and short time (ILO 2020), of which low-paid, low-skilled workers are the most vulnerable. A sudden loss of income has devastating consequences for this group of workers. In Africa, many countries are facing major health and economic challenges due to weak public health infrastructures, informality, and weak social protection systems.

The Zambian economy was in a fragile state before the onset of the COVID-19 pandemic, which accelerated job losses and economic contraction, leading to the economy going into a recession in 2020. As such, a comprehensive understanding of current and future skills needs is required to

mitigate the negative impact of COVID-19 on the labour market and develop effective reskilling and upskilling measures. As the economy recovers, there will be a demand for labour to re-enter the workforce.

The Skills Initiative for Africa (SIFA) Skills Anticipation Project and Skills Development for the Renewable Energy Sector (SkiDRES) Project therefore commissioned a rapid assessment in Zambia to collect information on skills needs arising from the impact of the COVID-19 pandemic and to identify the reskilling and upskilling needs of specific economic sectors, such as agriculture, energy, manufacturing and small and medium enterprises (SMEs), tourism and hospitality, and education and training.



2. Methodology

The methodological approach involved data collection using the following:



Literature review

A literature review of international and local literature relating to the reskilling and upskilling needs arising from the effects of the COVID - 19 crisis. It includes grey literature, peer-reviewed journals, government policies, and international studies.



Surveys

Enterprise and individual surveys of the targeted sectors were administered online and via telephone. The questionnaires were developed by the International Labour Organisation (ILO) and standardised to enable cross-country comparisons. There were 45 returns for the enterprise survey and 380 for the individual survey.



Stakeholder consultations

In-depth interviews with 15 representatives of key private sector organisations in the targeted sectors, state policymakers, the social partners, and civil society organisations were held.

3. Contextual factors

3.1 Macro-economic outlook

The economy of Zambia fell into a deep recession due to the adverse impact of the COVID-19 pandemic. Real gross domestic product (GDP) contracted by an estimated 4.9% in 2020, after growing by 4.0% in 2018 and 1.9% in 2019. The output contraction is the result of an unprecedented deterioration in all the key sectors of the economy.

Manufacturing output fell sharply as supply chains were disrupted, while the service and tourism sectors were hurt as private consumption and investment weakened due to measures taken to contain the spread of COVID-19. Mining output, which declined initially due to falling global demand for copper, is recovering amid production disruptions in South America. Sustained commodity price increases beyond the current forecast could lead to lower economic contraction.

Even before the pandemic, the economy was experiencing serious macroeconomic challenges, such as high inflation, widening fiscal deficits, unsustainable debt levels, low international reserves, and tight liquidity conditions. Despite government efforts to deploy monetary easing in 2019 and 2020, price levels and the financial sector have not stabilised. Inflation has been rising, mainly driven by the pass-through effects of the depreciation of the kwacha and elevated food and transport prices.

Following the outbreak of COVID-19, inflation rose to 17.4% in 2020 and is projected to remain above the target range of 6%-8% in 2021. The external position of the country also worsened in 2020, with dwindling reserves (averaging 1.6 months import cover), and will remain depressed in 2021 due to

copper price and output fluctuations, rising public debt payments, and elevated non-oil imports. The government's pursuit of expansionary fiscal policy for public investments, in spite of falling revenues, has resulted in widening fiscal deficits (8.3% of GDP in 2019 and 11% of GDP in 2020). The expansionary fiscal policy, mainly financed by external and local borrowing, caused Zambia's public and publicly guaranteed debt to hit 91.6% of GDP in 2019 and 104% in 2020. It will remain elevated in the medium term.³

The economy is projected to grow by 1.0% in 2021 and 2.0% in 2022, underpinned by a recovery in the mining, tourism, and manufacturing sectors.

The recovery of international demand for and prices of copper are positive developments, while a reduction in COVID-19 cases will boost activity both in manufacturing and tourism. However, the economy faces substantial risks that a second wave of the pandemic will impede global economic recovery and stifle demand for copper. A second wave could also undermine the revival of such critical sectors as tourism and manufacturing. Against this backdrop, poverty is expected to increase due to significant job losses in the service sector (on average, 30.6%), manufacturing (39%), personal services (39%), and tourism (70%).⁴

³ Zambia's economic outlook. Accessed at <https://www.afdb.org/en/countries-southern-africa-zambia/zambia-economic-outlook>.

⁴ Ibid.

3.2 Employment

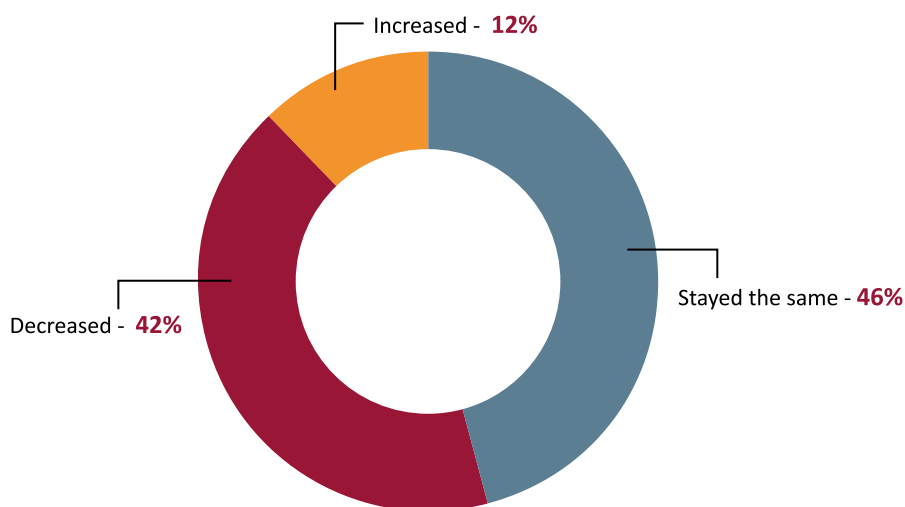
Although agriculture remains a small sector, it employs more than 2.9 million out of 5.9 million people. Agriculture is the sixth-largest (7.1% of GDP) sector. Wholesale and retail trade employs 690 000 people and is by far the largest sector, accounting for 22.6% of GDP, followed by mining (10.5%), construction (10.2%), and manufacturing (8.3%). Mining employs 82 000 people, construction 183 000, and manufacturing 234 000. Education is the fifth largest sector, accounting for 7.6% of GDP while employing more than 132 000 teachers, creating substantial formal employment. Zambia has 630 000 formally employed citizens, of which more than a third are in central and local government.⁵

The enterprise survey showed that by the end of 2020, employment levels had decreased in the energy, tourism and hospitality, mining and

quarrying, manufacturing, SME, and education and training sectors due to the COVID-19 pandemic and lockdown.

Employers mentioned that the outbreak of COVID-19 resulted in a 42% decline in employment levels. Although 46% mentioned that employment levels remained the same, with the pandemic continuing the possibility of further employment contraction exists. The declining employment level is threatening the livelihoods of retrenched workers and leading to increased hardship.

Figure 1: Employment change (2020)



Source: Enterprise survey (2020)

⁵ Country profile: Zambia. Accessed at <https://www.afdb.org/en/countries-southern-africa-zambia>

3.3 Sector analysis

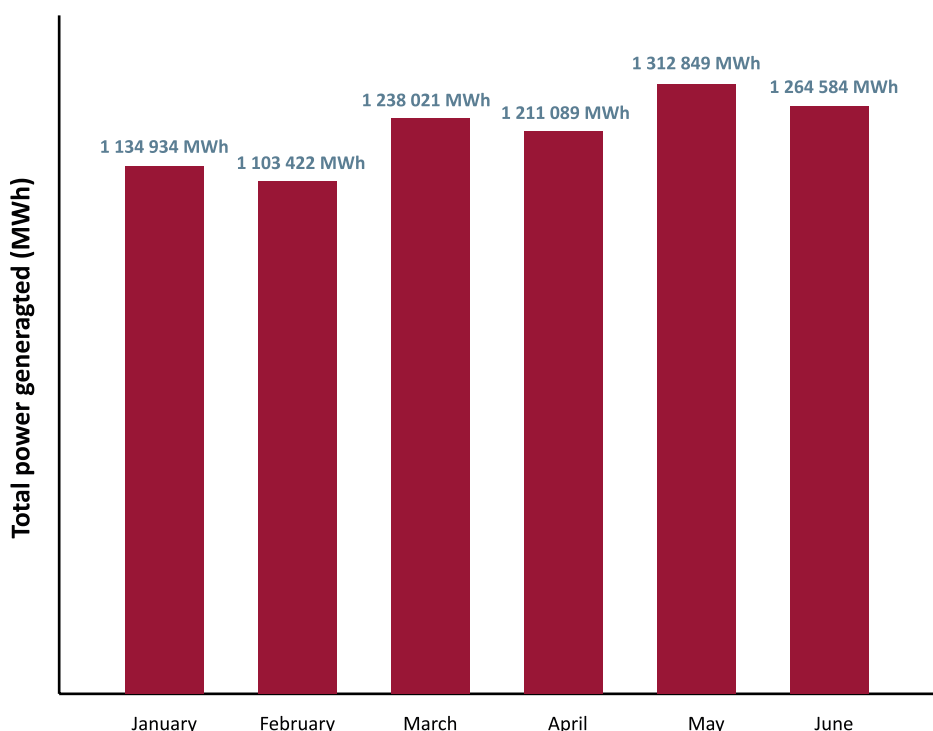
Education and training sector: The education and training sector was adversely affected by the pandemic, with schools and training institutions closing for about six months. The impact of closures was severe for private education institutions. Teachers and lecturers in the private sector were either laid off or put on half salary, while their public counterparts were unaffected.

The state was compelled to arrest the spread of the virus by closing all education institutions. Some education institutions experienced financial difficulties because students had to be refunded for fees and board and lodging. Other challenges were low utilisation of staff, lack of connectivity for educators and students, a prolonged academic calendar, and poor intake of international students. Education institutions, where possible, shifted to online teaching and learning. When education institutions reopened, health protocols such as

face masks, sanitisation, and social distancing were applied. For many schools, teachers, and students that do have connectivity, data, and technology, there was a loss of learning time.

Energy: The pandemic had a knock-on effect on the energy sector. Zambia uses hydroelectric power that is generated by the state-owned Zambia Electricity Supply Corporation (ZESCO) and private companies with Independent Power Purchase (IPP) agreements. Although other energy sources such as renewables and fossil fuels were affected, such as solar product vendors, the impact was mostly on the product supply chain rather than on power generation or electricity distribution. In fact, the pandemic did not affect power generation, which increased from January to June 2020 to 1 264 584 MWh (from 1 134 934 MWh), peaking to 1 312 849 MWh in May.⁶

Figure 2: Total power generation



Source: Energy Regulation Board Monthly Report (2020)

⁶ Energy Regulation Board Monthly Report, 2020.

Some energy companies slowed operations due to suspected employee infections, thereby destabilising process flows and productivity. The impacts affected homes, business premises, travel, social activities, and so forth. Sales dropped by more than 50% in some segments of the energy market due to lack of product availability, imported raw materials, finished products, and spares. Labour utilisation in some companies was low and the financial burden of keeping dormant employees on the payroll eroded margins.

Manufacturing and SMEs: Manufacturing experienced a drop in demand due to the pandemic, which in turn resulted in enterprises closing and workers being retrenched, put on short-time, or furloughed. The severity of the pandemic forced manufacturers to re-look their cost structures and skills requirements. Most SMEs are hair and beauty salons, fabricators, furniture makers, and general dealers.

Since 90% of the manufacturing labour force works in the informal sector, with the majority in subsistence agriculture,⁷ informal micro-enterprises felt the full brunt of the pandemic, especially as daily cash flow is required, which makes stay-at-home orders difficult to comply with.

However, there is cautious optimism for recovery due to the government's approval of the stimulus packages that were offered through the central bank for commercial banks for onward lending to various sectors. The result of this action is yet to be determined.

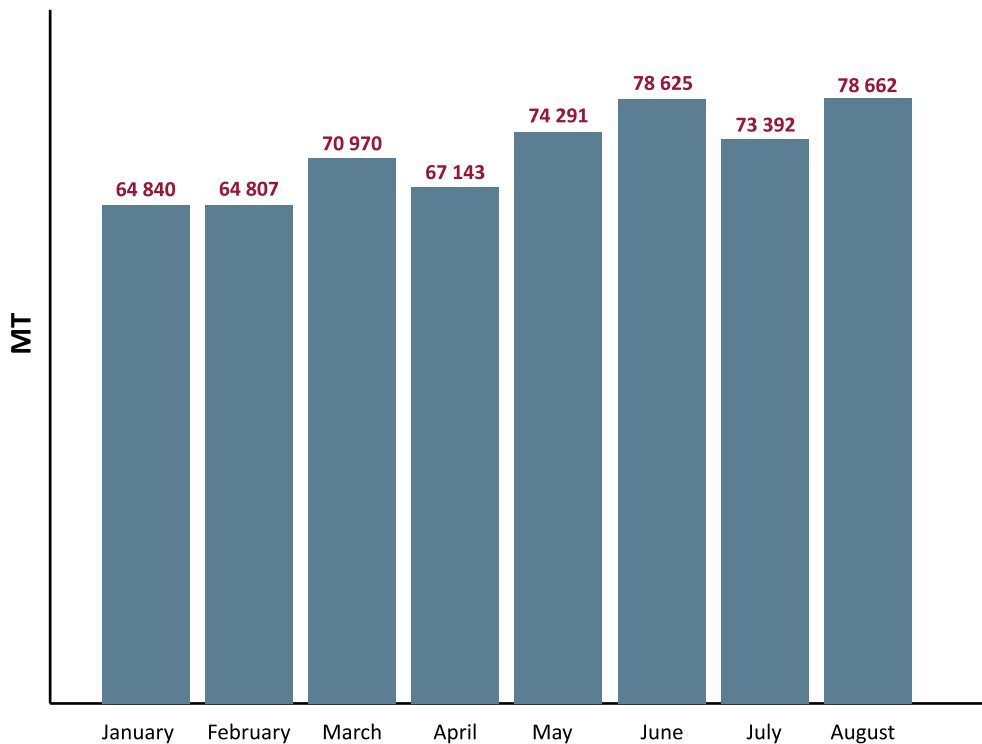


⁷ Central Statistics Office (2019) Labour Survey.

Mining sector: Copper is the mainstay of the Zambian economy, generating more than 80% of foreign exchange earnings. Hence, a drop in copper prices means that the impact will reverberate through the economy and affect the whole country. It also has a direct impact on tax collection and the delivery of public services. However, copper production surprisingly increased in by 21% between January and October 2020, and while the pandemic did lead to some loss of productivity, reduced sales, and interruptions in some mines, its impact on the copper mining sector was slight. Contract workers were more severely affected than their permanent counterparts. Figure 3 shows production outputs between January 2020 and 2020 October.

At the height of the pandemic, management of Mopani Copper Mine (MCM), one of the largest mines, nevertheless attempted to close operations and put the mines (Mufulira and Kitwe) on care and maintenance., but the government intervened due to the threat by the labour action and the spill-over impact on the mining towns. Conversely, the increase in global copper prices enabled other mines, such as Lumwana, Kalumbila, Kansanshi, and Chambeshi, to continue operations.

Figure 3: Copper production during COVID-19 (January to August 2020)

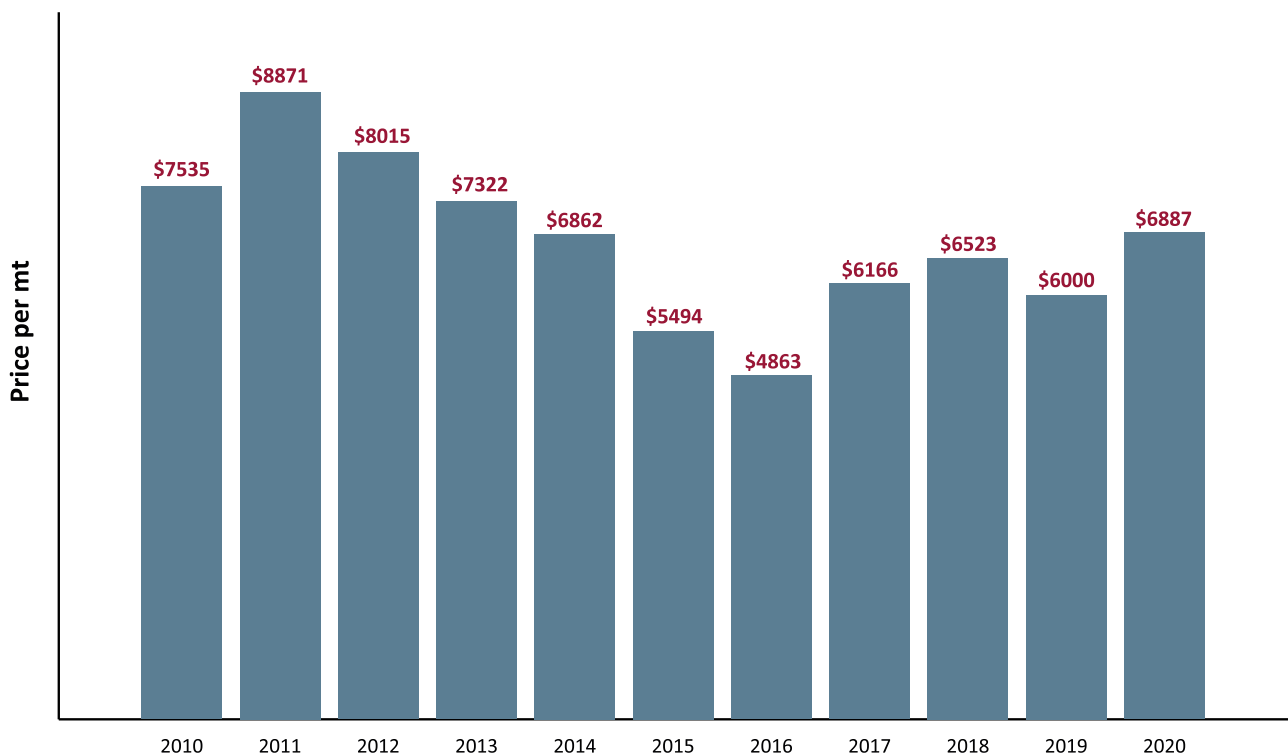


Source: Zambia Chamber of Mines (2020)

While copper production was largely unaffected by the pandemic, there was an impact on the global copper mining supply chain. Copper could not be transported outside Zambia because the main routes through South Africa, Mozambique, and Namibia to access international markets were

closed, and company closure in some foreign markets like India and China resulted in export sales declining. Furthermore, the import of production materials was curtailed. Figure 4 tracks the copper price between 2010 and 2020.⁸

Figure 4: Annual average price of copper per metric tonne (US\$)



Source: <https://www.statista.com/statistics/533292/average-price-of-copper>

Tourism: The tourism sector was severely affected by the pandemic. Within a month of the pandemic, most hotels, lodges, bars, and tourist attractions closed to the public. It led to huge job losses and significant losses of revenue. The sector effectively came to a standstill. The Tourism Council of Zambia estimated that between December 2019 and March 2020, the sector lost about 62 777 jobs and US\$416 400 million in revenue.

Notable tourist sites were closed to mitigate risks, including the Victoria Falls and Livingstone Museum. In the latter part of 2020, most companies turned to domestic tourism to keep afloat.

⁸ Accessed <https://www.statista.com/statistics/533292/average-price-of-copper/>

4. Individual survey

An individual survey was administered to both employed and unemployed workers. A total of 380 responses were received. About 48% of the respondents were women and 52% were men. The majority (80%) were aged 21-35 years, while 11% were 36-45, 6% were 46-65, and 3% were 16-20. Most respondents had vocational training after secondary (41%), followed by a bachelor's degree (36%), post-graduate (11%), and secondary education (11%). Only 1% did not complete any level.

Employment status: The breakdown of the respondents' employment status is shown in Table 1 below.

Table 1: Status of employment (2020)

Type of employment	No
Employed	224
Self-employed	44
Unemployed looking for work	97
Trainee or apprentice	06
Working in family businesses but unpaid	09

Source: Individual survey (2020)



Information status: Table 2 shows the percentage distribution of COVID-19 information and assistance received by respondents by employment status.

Table 2: Percentage distribution of COVID-19 information and assistance received

Question	Employed	Self-employed	Trainee or apprentice	Working in the family business but unpaid	Not in employment but looking for work	Total
Since the COVID-19 crisis started have you received any information about working during the crisis?						
Yes	74.9 (194)	10.4 (27)	1.5 (4)	1.5 (4)	11.6 (30)	259
No	25 (30)	14.2 (17)	1.7 (2)	3.3 (4)	55.8 (67)	120
Don't know	0 (0)	0 (0)	0 (0)	100 (1)	0 (0)	1
Who has supplied that information?						
National government	78.1 (150)	9.9 (19)	1.6 (3)	1.6 (3)	8.9 (17)	192
Local government	73 (65)	10.1 (9)	3.4 (3)	1.1 (1)	12.4 (11)	89
Trade unions	66.7 (12)	11.1 (2)	0 (0)	0 (0)	22.2 (4)	18
Sector organisation	73.2 (52)	7 (5)	1.4 (1)	0 (0)	18.3 (13)	71
Unemployment insurance fund	66.7 (2)	0 (0)	0 (0)	0 (0)	33.3 (1)	3
Charities	51.7 (15)	13.8 (4)	6.9 (2)	0.0	27.6 (8)	29
Have you received financial assistance during the COVID-19 crisis?						
Yes	92.9 (13)	0 (0)	7.1 (1)	0 (0)	0 (0)	14
No	57.6 (209)	12.1 (44)	1.4 (5)	2.5 (9)	26.4 (96)	363
Don't know	66.7 (9)	0 (0)	0 (0)	0 (0)	33.3 (0)	3
Who has provided financial assistance?						
National government	90 (9)	0 (0)	10 (1)	0 (0)	0 (0)	10
Local government	100 (3)	0 (0)	0 (0)	0 (0)	0 (0)	3
Trade unions	50 (1)	0 (0)	50 (1)	0 (0)	0 (0)	2
Sector organisations	66.7 (2)	0 (0)	33.7 (0)	0 (0)	0 (0)	3
Charities	100 (1)	0 (0)	0 (0)	0 (0)	0 (0)	1

Source: Individual survey (2020)

About 75% (194) of those who have received information about working during the crisis were employed, compared to 10% (27) self-employed, and 12% (30) not in employment but looking for work. The top three major suppliers of this information include national government, local government, and sector organisations. Only 14 respondents reported having received financial assistance during the COVID-19 crisis (13 in employment and one self-employed individual). This financial assistance was provided by the national government, local government, sector organisations, trade unions, and charities.

operating hours affected business operations, resulting in reduced tax and non-tax revenue, and posing an employment challenge. Since the start of the pandemic, employees have been on leave (4%), temporarily laid off and do not expect to return to work (1%), temporarily laid off but expect to return to work (3%), working at the usual place of work (72%) or working from home (17%).

Although 61% of those in the education and training sector are working from home, up to 67% of those in the manufacturing and SME sector have been temporarily laid off but expect to return to work.

Current employment situation: The economic effects of COVID-19 have filtered down to employees. Lack of working capital and restricted

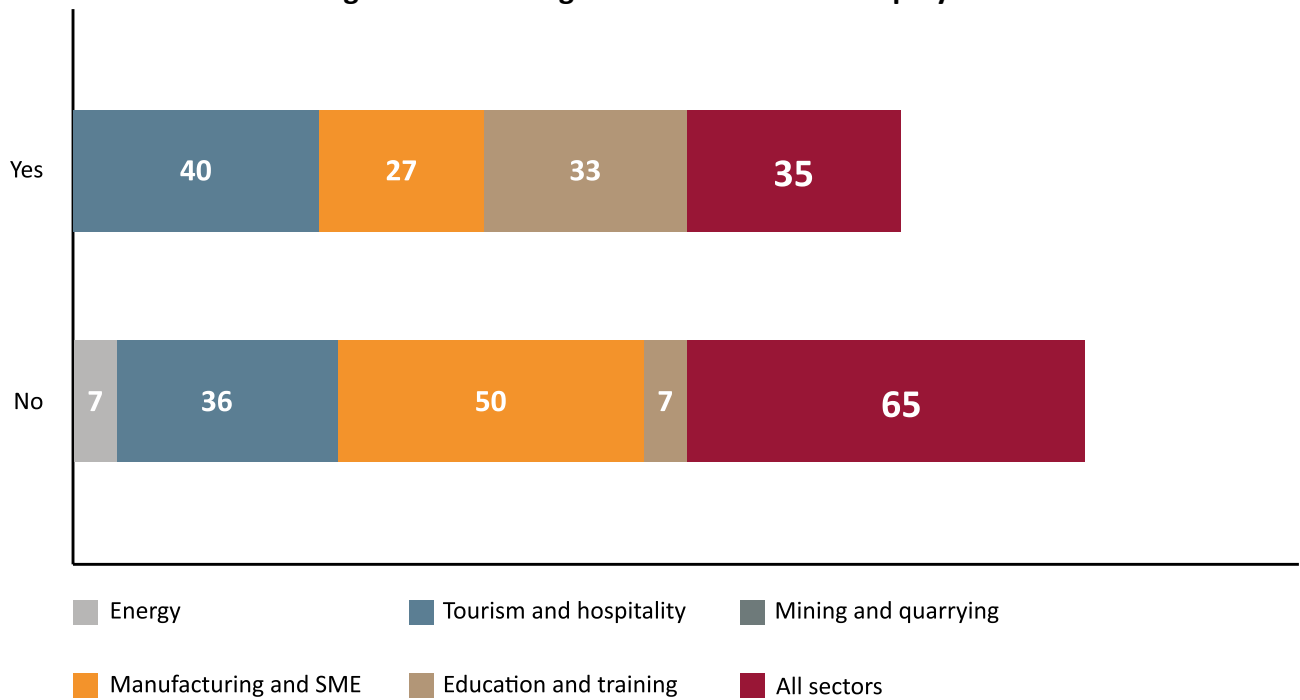
Table 3: Current employment situation (2020) in percentages

Thinking about your employment now, what best describes your current employment situation?							
Sectors	Working at the usual place of work	Working from home	On leave	Sick leave	Temporarily laid off but expect to return to work	Temporarily laid off and do not expect to return to work	Don't know
Energy	4	0	0	0	0	0	0
Tourism and hospitality	6	8	10	50	33	50	0
Mining and quarrying	7	3	10	0	0	0	0
Manufacturing and SME	37	29	20	0	67	50	71
Education and training	46	61	60	50	0	0	29
All sectors	72	17	4	1	3	1	3

Source: Individual survey (2020)

Self-employed: The pandemic exposed the drawbacks of self-employment. This group had no safety net for salary loss. There were also no social employee benefits. The decline in economic activity affected their work, especially in the tourism sector.

Figure 5: Percentage distribution of self-employed

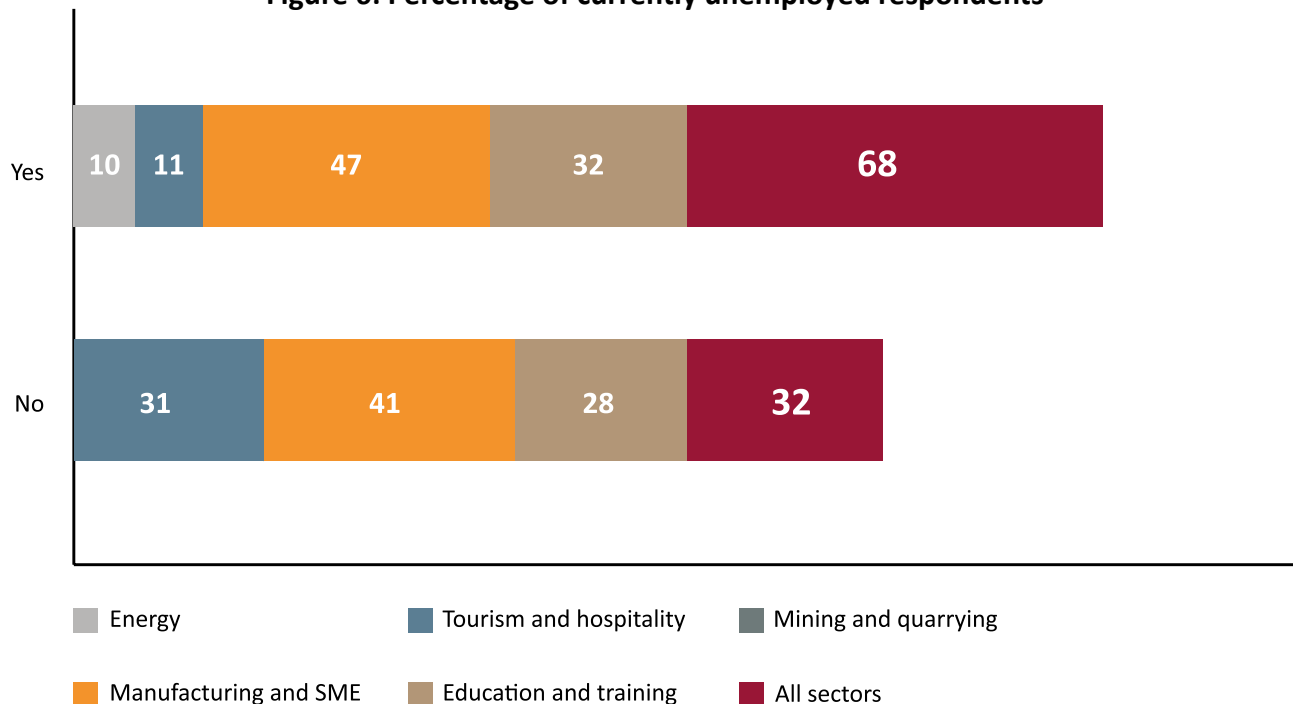


Source: Individual survey (2020)

Unemployed: Over two-thirds (68%) percent of respondents reported that they were employed, while 32% were unemployed. Disaggregated by sector, the results showed that a high proportion of the currently unemployed (47%) worked in the manufacturing and SME sector, while 32% were

employed in the education and training sector. Regarding their last job, 69% of the unemployed worked for an employer, 14% were self-employed, 7% worked in the family business, and 10% in other sectors.

Figure 6: Percentage of currently unemployed respondents



Source: Individual survey (2020)

Salary change: Since the crisis, 74% of workers' salaries stayed the same, compared to 15% which decreased and 4% which increased. The manufacturing and SME sector reported the highest decrease (56%), followed by the education and training sector (24%).

Table 4: Percentage salary change

Sectors	Since the COVID-19 crisis has your salary changed?			
	Increased	Stayed the same	Decreased	Don't know
Energy	5	4	3	0
Tourism and hospitality	0	6	18	14
Mining and quarrying	5	7	0	0
Manufacturing and SME	70	27	56	71
Education and training	20	56	24	14
All sectors	4	74	15	3

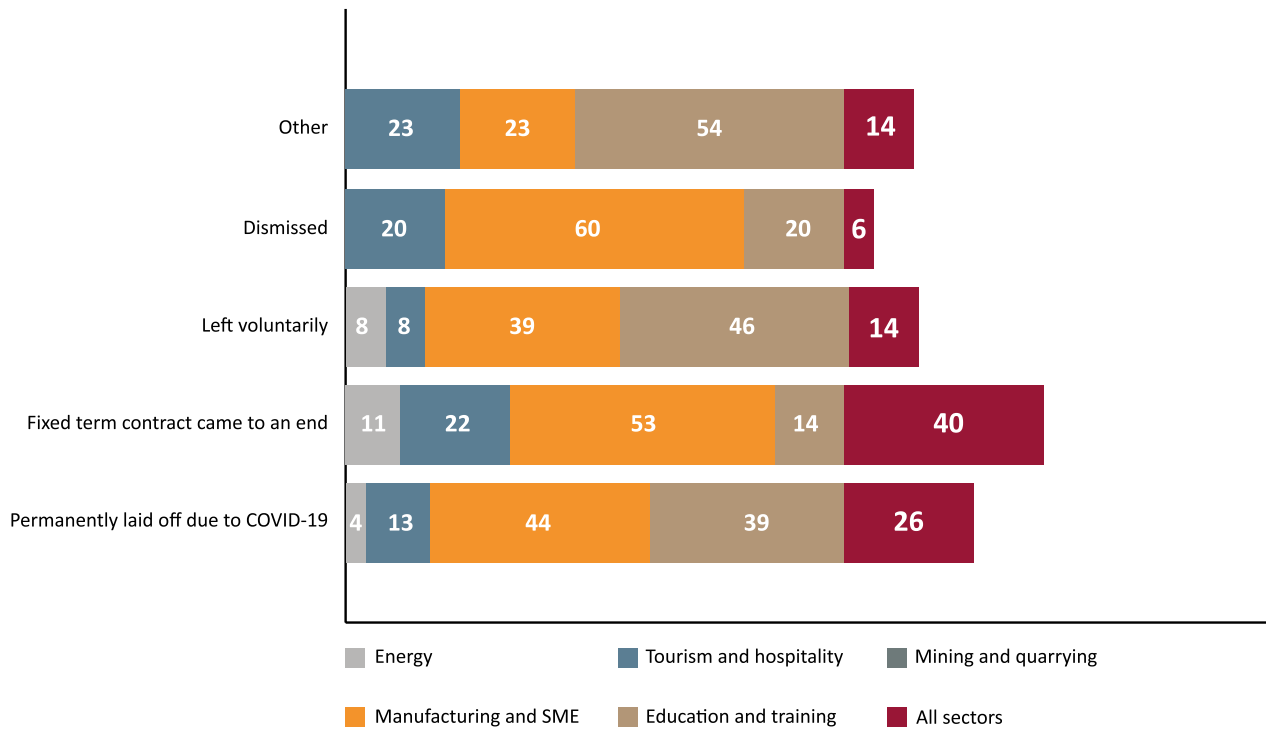
Source: Individual survey

Reasons for leaving the previous job: Overall, about 40% of respondents stated that they left their previous job because their fixed-term contract ended, 26% were permanently laid off due to the pandemic, 14% left voluntarily, 6% were dismissed, and 14% for other reasons. Disaggregated by sector, the majority (44%) of the currently unemployed who are based in the manufacturing and SME sector

were permanently laid off due to the pandemic, followed by the education and training sector (39%).

The occupations that they used to be doing, ranked in order of the high number of responses, included clerical support, services and sales, technician/associate professional, professional, and elementary occupation.

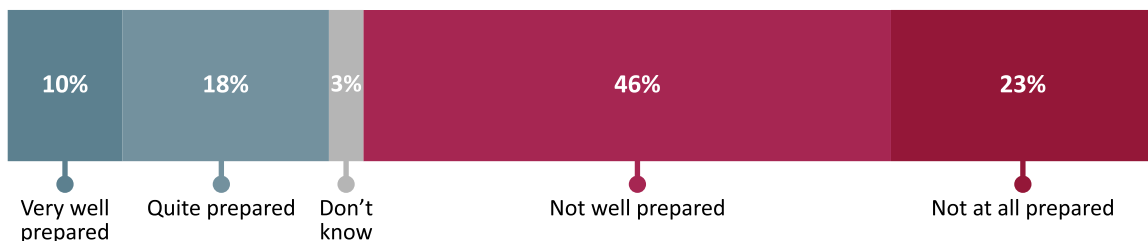
Figure 7: Reasons for leaving the previous job



Source: Individual survey

Dealing with the change: Almost half (46%) of individuals were not well-prepared to deal with changes due to the pandemic, while 23% specified that they were not at all prepared, 18% were quite prepared, and 10% were very well prepared.

Figure 8: Dealing with the change



Source: Individual survey

Working from home: Most employers implemented remote working protocols as a prevention measure. In the manufacturing and SME sector, 50% worked from home, while in the energy sector, no one worked from home. In the tourism and hospitality sector, 33% worked from home sometimes.

Table 5: Percentage working from home

Sectors	Since the COVID-19 crisis started, have workers been working from home?		
	Yes, all the time (%)	Yes, sometimes (%)	No (%)
Energy	0	0	0
Tourism and hospitality	0	33	67
Mining and quarrying	0	100	0
Manufacturing and SME	50	0	50
Education and training	3	72	24
All sectors	8	64	28

Source: Individual survey

Communication with colleagues: In all sectors, 51% of respondents communicated much more with their colleagues using online platforms, 32% a little more, 10% about the same, 4% a little less, 2% a lot less, and 1% don't know.

Table 6: Communication with colleagues

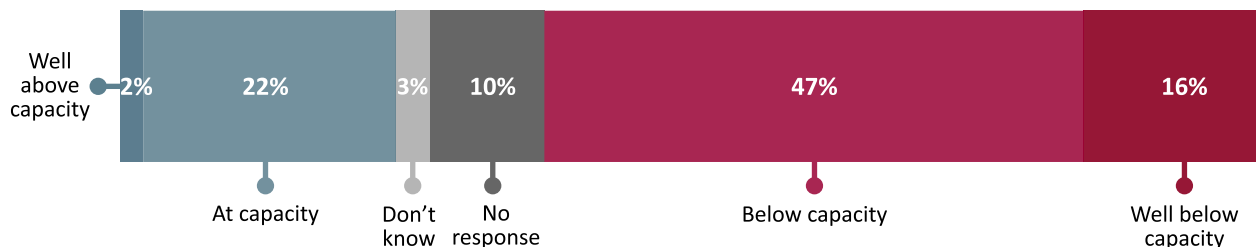
Sectors	Have you had to communicate more with your colleagues using online platforms before COVID-19?					
	Yes, very much more	Yes, a little more	About the same	A little less	A lot less	Don't know
Energy	56	22	11	11	0	0
Tourism and hospitality	41	24	24	6	6	0
Mining and quarrying	54	31	8	8	0	0
Manufacturing and SME	49	34	8	2	4	2
Education and training	52	33	9	4	1	1
All sectors	51	32	10	4	2	1

Source: Individual survey

5. Enterprise survey

Establishment functional status: Some employers were able to continue their operations normally, while others were adversely affected. Almost half (47%) of those surveyed indicated that their establishments were functioning below capacity, while 16% were functioning well below capacity.

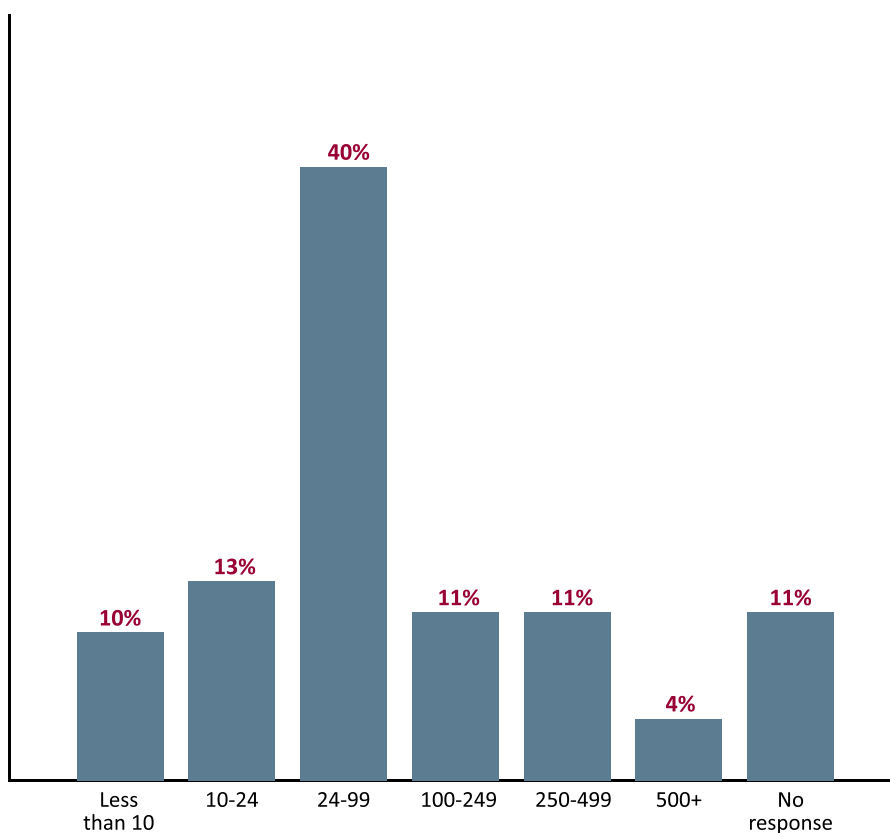
Figure 9: Functional status of establishment



Source: Enterprise survey (2020)

Enterprise size: In terms of the number of workers employed, 40% of employers had between 24 and 99 workers, while 4% employed more than 500 workers.

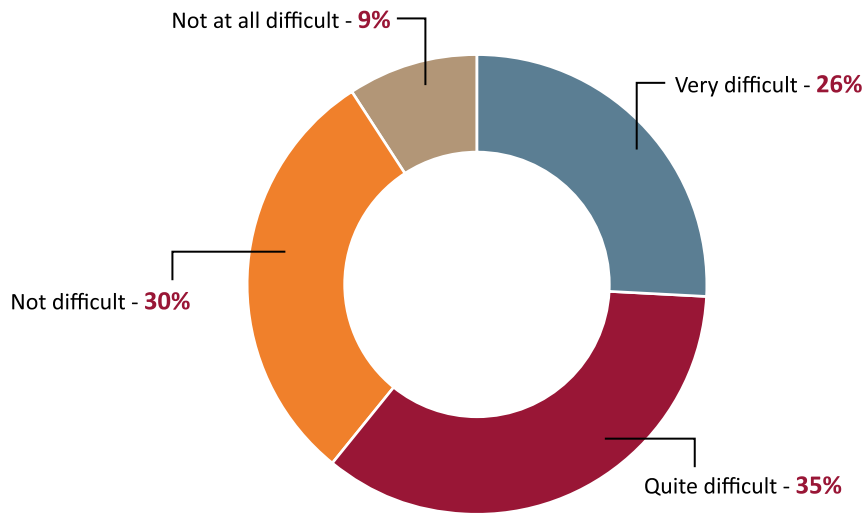
Figure 10: Enterprise size



Source: Enterprise survey (2020)

Training: Since many employers introduced remote working during the pandemic, there was a need to empower employees with the appropriate skills and techniques to enable them to work remotely. While 26% of employers found giving employees training very difficult and 35% found it quite difficult, 30% did not find it difficult and 9% found it not difficult at all.

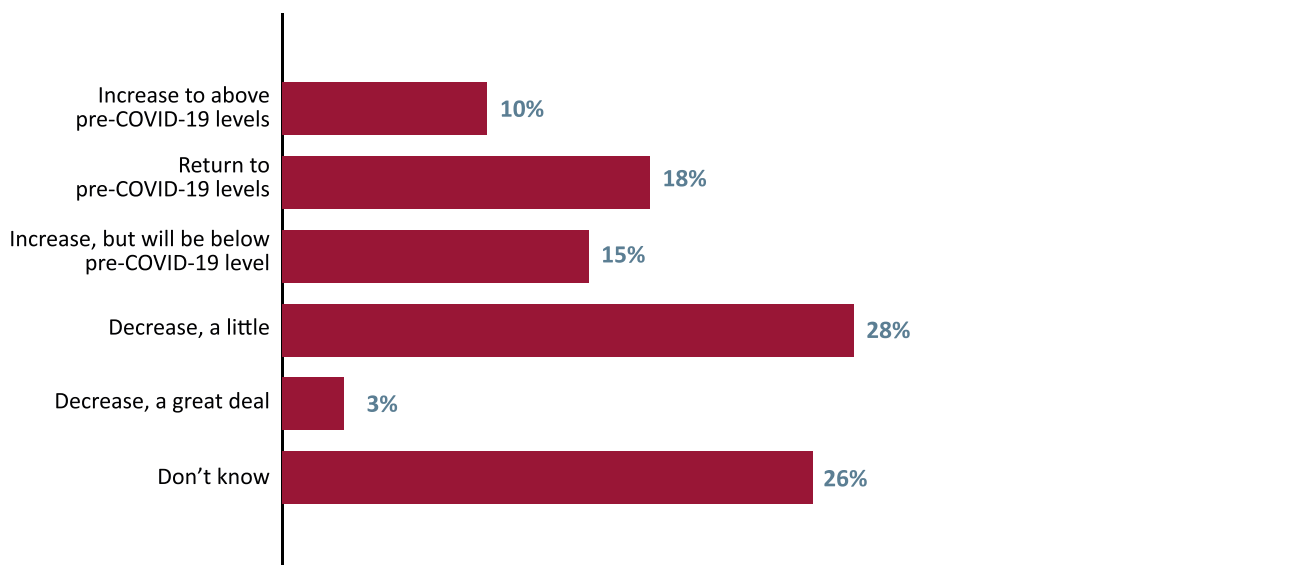
Figure 11: Training



Source: Enterprise survey (2020)

Employment outlook: Employers in the survey had mixed expectations about the employment outlook in the next six months, ranging from 28% predicting employment to decrease a little to 18% expecting a return to pre-pandemic levels. A significant number (26%) did not know.

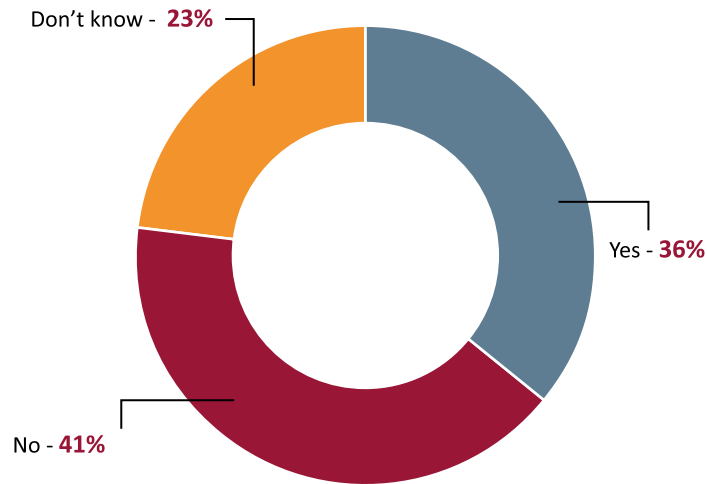
Figure 12: Employment outlook



Source: Enterprise survey (2020)

Opportunities: More employers (41%) did not foresee opportunities arising from COVID-19 issues than those that did (36%). The remainder (23%) did not know.

Figure 13: Opportunities for the establishment



Source: Enterprise survey (2020)

Training areas: Respondents received training in the following areas:

Table 7: Opportunities for the establishment

Top 5 skills	Areas of training received	%	Number of observations
1	Use of digital communication technologies using Zoom, MS Teams, Skype, WhatsApp, Google Meet	13	48
2	Job-c or occupation-specific technical skills	10	38
3	Using new equipment	8	29
4	Using digital technologies to maintain internet connections, accessing computer resources at your place of work	7	27
5	Team leading, supervisory or management skills	6	21

Source: Enterprise survey (2020)

Training preferences: In terms of training preferences, respondents stated the following:

Table 8: Training preferences

Sectors	What training would you have liked?						
	Using new equipment	Job-c or occupation-specific technical skills	Managing a wider range of tasks than before COVID-19	Team leading, supervisory or management skills	Use of digital communication technologies using Zoom, MS Teams, Skype, WhatsApp, Google Meet	Using digital technologies to maintain internet connections, accessing computer resource at work, etc.	Working in teams where not everyone can be in the place of work
Energy	6	4	3	5	2	2	5
Tourism and hospitality	9	11	3	9	6	4	2
Mining and quarrying	3	4	11	9	9	10	12
Manufacturing and SME	29	38	58	21	26	24	46
Education and training	23	42	25	57	57	61	34
All sectors	9	15	10	11	17	13	11

Source: Enterprise survey (2020)

Training for the job: Almost half (48%) of employees in establishments did not receive the training that they would have liked to receive, while 35% received training to ensure that they have the necessary skills to do their job during the COVID-19 crisis. A further 15% indicated that they did not need training. Sectorally, 56% of individuals in the

energy sector and 53% in the education and training sector would have liked to receive training. For mining, the figure was 46%, and the manufacturing and SME sector was 43%. The individuals in tourism and hospitality constituted 41%.

Table 9: Training for the job

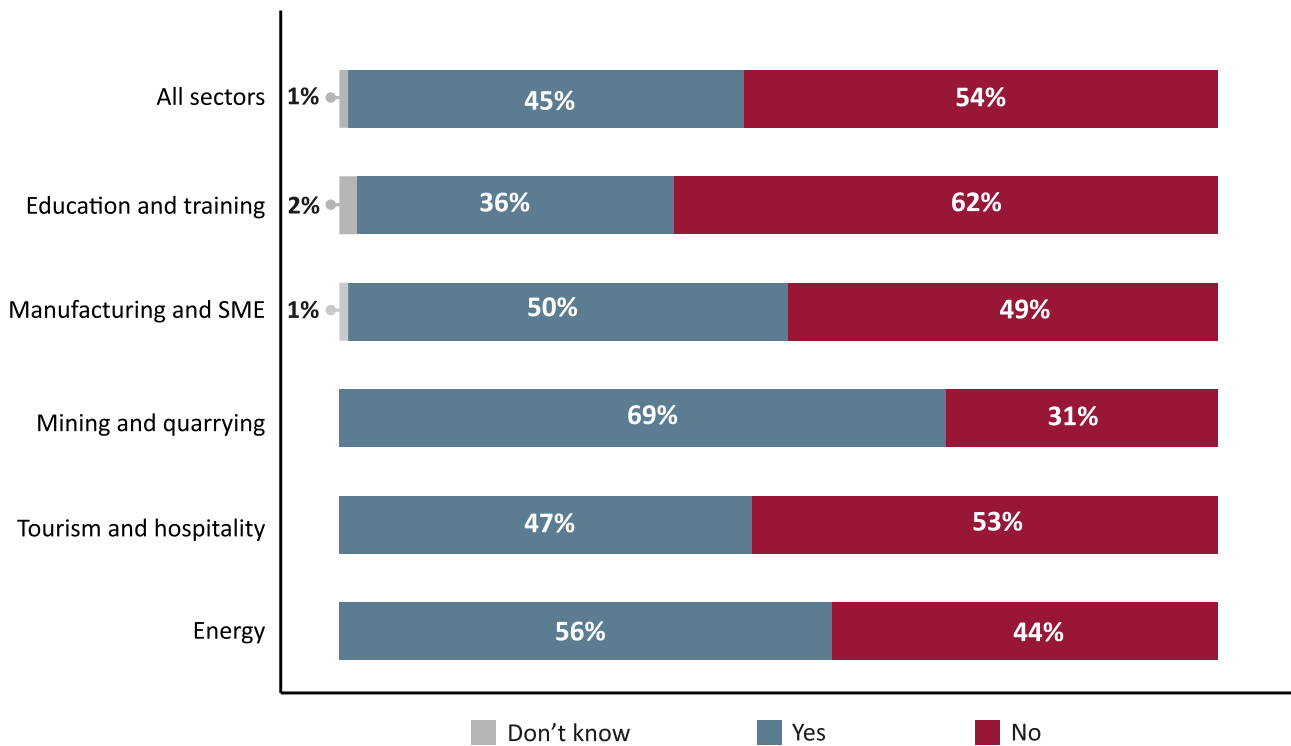
Sectors	Apart from health and safety, have you received any training to ensure that you have the necessary skills to do your job during the COVID-19 crisis?			
	Yes	No, but would have liked some	No, not needed	Don't know
Energy	22	56	22	0
Tourism and hospitality	35	41	24	0
Mining and quarrying	39	46	15	0
Manufacturing and SME	38	43	16	4
Education and training	34	53	13	0
All sectors	35	48	15	1

Source: Enterprise survey (2020)

Health and safety training: Since the COVID-19 health crisis, only 45% of the individuals have undertaken any health and safety training. Sectorally, 69% of those in the mining and quarrying

sector have undertaken health and safety training, 36% in the education and training sector, 50% in the manufacturing and SME sector, 47% in tourism and hospitality, and 56% in the energy sector.

Figure 14: Health and safety training



Source: Enterprise survey (2020)

Training received: Around a third (31%) of individuals had received training which will help them to keep their jobs after the COVID-19 crisis, while 47% had not received training but would have liked to. Most of those in the energy sector (44%) have received training, in contrast to most of those in the mining and quarrying sector (62%) who had not received training but would have liked to.

Table 10: Training received

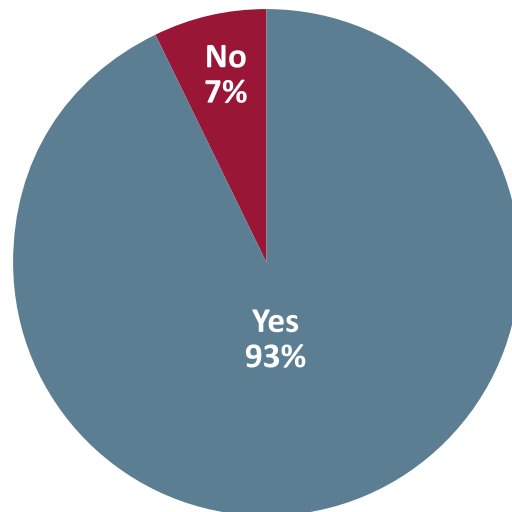
Sectors	Have you received any training, which will help you to keep your job after the COVID -19 crisis?			
	Yes	No, but would have liked some	No, not needed	Don't know
Energy	44	33	22	0
Tourism and hospitality	24	47	29	0
Mining and quarrying	23	62	15	0
Manufacturing and SME	36	42	19	4
Education and training	28	51	20	2
All sectors	31	47	20	2

Source: Enterprise survey (2020)



Training needs: In 93% of the establishments, staff will need to be trained to take advantage of new opportunities. Some of the most important areas where training is needed are digital skills, technical skills for the specific type of job, people management skills, skills for green jobs and environmental sustainability, and administration, and customer relations skills.

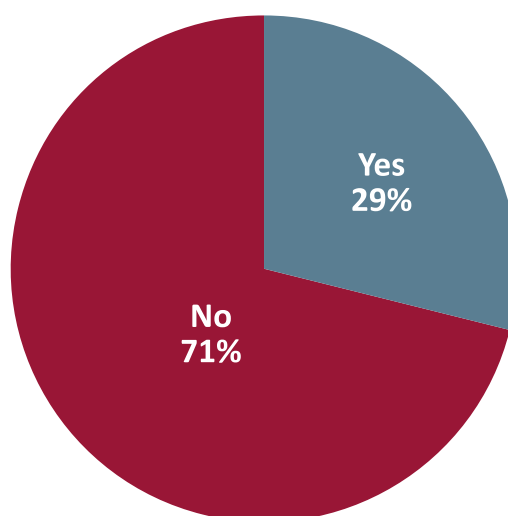
Figure 15: Training needs



Source: Enterprise survey (2020)

Difficulties in providing training: Up to 29% of the establishments have experienced some difficulties in providing training to existing employees, with difficulties ranging from the cost of training and finding external trainers that can deliver skills training needed, to different work schedules and network challenges. Other reasons are that they cannot afford training, or no training is available.

Figure 16: Training difficulties



Source: Enterprise survey (2020)

6. Recommendations



EDUCATION AND TRAINING SECTOR



Findings

The impact of COVID-19 on the education and training sector was immediate, with schools and training institutions closed for over six months. The stakeholder consultations showed that most teachers and lecturers in private schools and higher institutions of learning were either laid off or put on half salary. The consultations also showed that the education and training sector must embrace technology during and after the COVID-19 pandemic.



Recommendations

The following actions are recommended:

- ▶ **Occupational health and safety:** Skills training for occupational health and safety should be implemented to minimise the risks of spreading the virus among teachers, learners, and visitors in the school environment through measures such as wearing of face masks, social distancing, cleaning facilities, washing hands, and temperature and symptoms checks.
- ▶ **E-learning:** Skills training for e-learning should be given to all managers, teachers, and learners to enable them to take advantage of this medium. All teachers should be trained to deliver teaching and learning activities online.
- ▶ **Digital migration:** Schools should be equipped with the appropriate hardware and software to enable a transition to e-learning platforms. Since many learners do not have access to internet connectivity, computers and tablets, provision should be made for learners to access e-learning in the school.
- ▶ **Accessibility:** Government should create facilities for learners from underprivileged households and rural areas to access the internet.



ENERGY SECTOR



Findings

Power generation and electricity distribution were affected by the pandemic, although the impact was less on the retail of solar products and liquefied petroleum products. Some parts of the energy value chain halted due to infections and workplace restrictions which affected productivity. Casual workers were most vulnerable and job losses for this group were severe, especially in hydropower plants.



Recommendations

The following actions are recommended:

- ▶ **COVID-19 health and safety protocols:** Skills training for the application of COVID-19 health and safety protocols should be implemented to minimise the risks of spreading the virus in the workplace setting through measures such as wearing of face masks, social distancing, cleaning facilities, washing hands, and temperature and symptoms checks.
- ▶ **Training:** Employees should be given customer service and communication skills training to improve service delivery.
- ▶ **Emerging energy enterprises:** Small emerging service providers in the energy sector should be given enterprise development and entrepreneurship skills training in areas such as marketing, personal selling, digital technology, effective communication, and basic financial management.
- ▶ **Re-hire casual workers:** Casual workers should be re-hired as business activity increases and offered technical skills training for employability and entrepreneurship.
- ▶ **Manager training:** Senior managers should be trained in risk management to avoid future disruptions.



MANUFACTURING AND SME SECTOR



Findings

All enterprise types ranging from large to micro-businesses were severely affected by the crisis. The most affected were fabricators, woodworkers, builders, and electricians. In large companies, clerical workers and sales staff were also affected. Some large and medium-sized manufacturing enterprises migrated to e-commerce platforms. Teleworking, remote learning, teleconferencing and digital payments increased exponentially.



Recommendations

The following actions are recommended:

- ▶ **Training to leverage digital technology:** Training should be offered in manufacturing enterprises to leverage digital technology for business continuation and markets.

Digital skills training: Manufacturing employees should be given training on how to conduct business through e-commerce and the digital skills training to do so. Small manufacturing firms should be given

- ▶ incentives to introduce e-commerce as a trading option.

SMEs: SME business owners should be given training in teamwork, management, marketing, financial

- ▶ management, customer relations, business planning, resilience, and leadership skills.



MINING SECTOR



Findings

The mining sector was only mildly affected by the pandemic given that mining operations continued. Job losses were prevalent for casual and contract workers. Although some mines threatened to lay off workers, government intervention ensured that lay-offs were minimised.



Recommendations

The following actions are recommended:

COVID-19 health and safety protocols: As with the other sectors, skills training for the application of COVID-19 health and safety protocols should be implemented to minimise the risks of spreading the virus in the workplace setting through measures such as wearing of face masks, social distancing, cleaning facilities, washing hands, and temperature and symptoms checks.

Skills training: Skills training in the following is required in mining companies at various occupational levels:

- Digital skills (all levels)
- Communication (all levels)
- Decision-making (all levels)
- Design engineering (artisan, technician, professional)
- Time management (all levels)
- Productivity and quality (all levels)
- Maintenance scheduling (all levels)
- Project management (manager)
- Technical/artisan skills (electricians, mechanical fitters, boilermakers, and riggers)
- Supervisory skills (junior and middle management)



TOURISM AND HOSPITALITY SECTOR



Findings

The tourism and hospitality sector was severely impacted by the pandemic. Hotels, lodges, bars, and tourist attractions were closed and In-bound tourism came to a halt. This resulted in massive job losses. Between December 2019 and March 2020, the sector lost around US\$ 416 400 million in revenue and about 62 777 jobs. Attention should thus be paid to the changes in tourism products, the necessary safety concerns, as well as the proper reading of the trends of the sector.



Recommendations

The following actions are recommended:

Skills training in occupational health and safety: Skills training should be given to employees on government protocols for safe operating practice and new workplace standards, including infection prevention and hygiene control, in addition to skills training for the application of COVID-19 health and safety protocols to minimise the risks of spreading the virus in the workplace setting through measures such as wearing of face masks, social distancing, cleaning facilities, washing hands, and temperature and symptoms checks.

Digital skills training: There has been a swift migration of tourism and hospitality enterprises to e-commerce platforms. This trend has been accelerated with COVID-19. All employees in the sector should thus be trained to use digital skills in their work tasks, where possible.

Other tourism and hospitality skills training: Employees also require training in the following areas:

- Customer service
- Tour guiding
- Critical thinking, decision-making, and problem-solving
- Management
- Delivery of goods and services
- Occupational health and safety



PUBLIC EMPLOYMENT SERVICES



Findings

Public Employment Services (PES) plays a critical role in matching work-seekers to jobs thereby reducing employment friction in the labour market. In Zambia, this service is offered by the local Labour Office that is situated in cities and towns. The devastating effects of the COVID-19 pandemic on the labour market has highlighted the urgent need for policy measures and strategies for employment guarantees. Public Employment Services (PES) can play a critical role in matching work-seekers to jobs thereby reducing employment friction in the labour market. In the aftermath of the COVID 19 pandemic, public employment services can assist to systematically provide short-time work (STW) schemes, which can be linked with the unemployment insurance system or special employment funds to partially cover subsidies for wages. This is especially important for first-time labour market entrants and for vulnerable workers.



Recommendations

The following actions are recommended:

Strengthening of Labour offices: A capacity-building intervention should be implemented to improve the effectiveness and efficiency of the local labour offices countrywide through:

- Research of local labour markets
- Employer engagement for work placements
- Career guidance and counselling services for work-seekers
- Provision of internet facilities for work-seekers
- Monitoring of labour market trends
- Training of labour office staff

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▶ ANNEXURE A: LIST OF INTERVIEWEES

NO	NAME	ORGANISATION	POSITION
1	Bornface Phiri	ZCTU	Research director
2	Alex Mbumba	ZESCO Ltd	Director
3	Clement Sasa	Ministry of energy	Manager
4	Moffat Bili	MLSS	Director: Planning
5	Jennifer Chibuye	Nkumbi TTI	Principal
6	Mr Haaniinga	NUTAWZ	Secretary general
7	M. Grace	Mwarona College	Director
8	Ethel Mbewe	SOTTI	Principal
9	Angela Chanda	BETUZ	Deputy secretary-general
10	Sally Mebs	Sally Mebs Travel & Tours	Director
11	Mr Nyirenda	Ukwimi TTI	Principal
12	Brenda Sampa	Air transport	Employee
13	Emmanuel Kapopo	Hotels and tourism	Employee
14	Laurence Zulu	Lusaka BTC	Principal
15	Bryson Nyirenda	NUBEW	General secretary
16	Nephias Moyo	Zamita	Project coordinator
17	Mumbi Adrian	Ministry of Mines and Mineral Development	Mining technician
18	Evans Chilekwa	Mopani Copper Mines	Employee
19	Jairo Ndlovu	Mopani Copper Mine	Superintendent
20	Pearson Makunku	UNILUS	Lecturer
21	Misozi Shamboko	ZESCO	Business development manager
22	Cleophas Takaiza	TEVETA	Director general
23	Victor M. Mulenga	NORTEC	Principal
24	Georgina Chama	LVTC	Principal
25	S. H. Moyo	Luanshya TBC	Principal

NO	NAME	ORGANISATION	POSITION
26	Daka Charles	Kaoma TTI	Principal
27	Joseph Mutelo	Zamim	Inspector
28	Nkole Victor	Kitwe Trades	Principal
29	Daniel Fwambo	EHC	Principal
30	Mirriam Mwale	Chipata TTI	Principal
31	Faith Shonga	Livingstone Tourism Association	Programme manager
32	Frank Chiwele	Liutebm University	Lecturer
33	Mary Lubinda	Mulungushi University	Lecturer
34	Brian Mutale	NCC	Administrator
35	Christopher Chisense	Zambezi River Authority	Director
36	Ms Musadabwe Edna	HCAZ	Executive secretary
37	Victor Inambwawe	Tourism Council of Zambia	Executive director
38	Zondi Chilembo	Ministry of Tourism and Arts	Data manager
39	Florence Muleya	Zambia Association of Manufacturers	Managing director
40	Enerstine Musaba	Fawltly Towers	Manager
41	Yewa Kumwenda	Chamber of Mines	Manager
42	Mwaba Matimba	KGRTC	Consultant: Training

