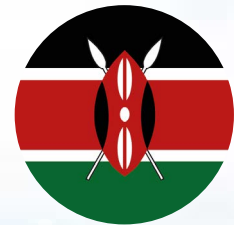


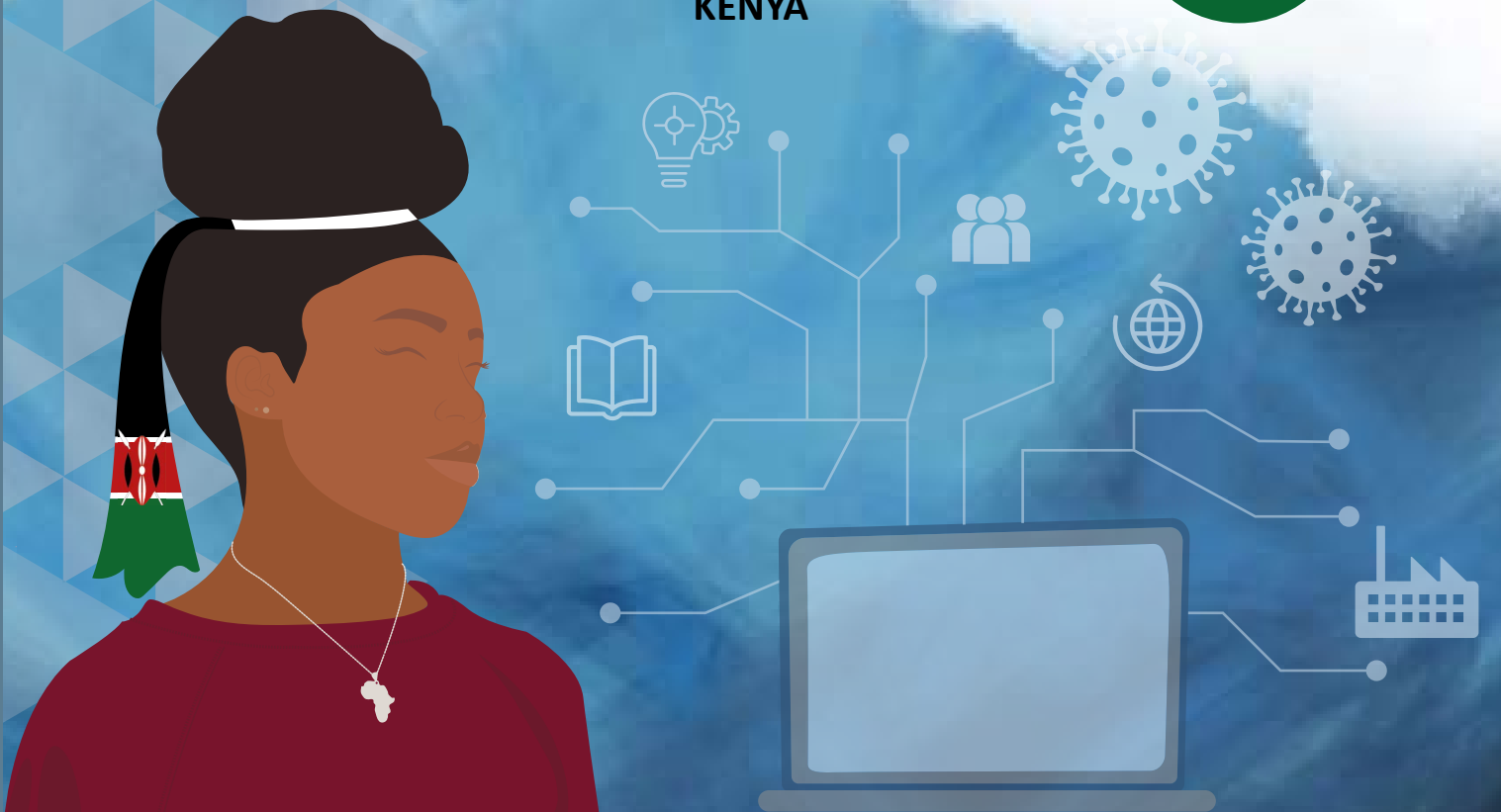
SIFA
Skills Initiative
for Africa

TC
Technical Cooperation

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



KENYA



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

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the technical quality, credibility, and policy visibility of the rapid assessment and would not be possible without their support.

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FOREWORD

The negative impact of the COVID 19 pandemic has gone beyond its health implications and includes repercussions that have caused massive labour market disruptions, including high unemployment levels, and economic hardships. The scale of economic and social implications has been unprecedented and is reshaping the way we work, live, and socialise.

In Kenya, the pandemic has exacerbated already existing development challenges and has adversely affected women, who bear the burden of care and of managing the households. The negative impact of the pandemic notwithstanding, there have been sectors of the economy that have grown and provided mitigation responses and opportunities needed to manage the pandemic and to create new types of jobs.

This rapid skills assessment study was commissioned against this background and as a response to the impact of COVID-19 on the labour market in Kenya. The study was conducted in the Manufacturing,

Dr Ibrahim Mayaki
Chief Executive Officer
African Union Development Agency (AUDA-NEPAD)

Hospitality (Accommodation and Food Services), and Education, which were identified as sectors that had been impacted negatively by the pandemic and which required a re-orientation of occupations and possibly top-up skills for the workers.

This report presents the findings of the rapid assessment with a clear analysis of the effects of pandemic on assessed sectors. The report provides practical recommendations that can help to limit the career-scarring effects of the pandemic on the labour forces through provision of skilling and reskilling interventions. The report also provides actionable skills related recommendations for the economic recovery of the companies in the assessed sectors.

The ILO and the African Union Development Agency (AUDA-NEPAD) remain committed to working with the Kenyan Government and its partners to mobilise the requisite follow up action based on the report's recommendations.

Dr. Joni Musabayana
Director
Decent Work Team for Eastern and Southern Africa
International Labour Organization

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► ABBREVIATIONS AND ACRONYMS

COTU	Central Organisation of Trade Unions
ILO	International Labour Organisation
ICT	Information and communications technology
PPE	Personal protective equipment
SIFA	Skills Initiative for Africa
SME	Small and medium enterprise
TIVET	Technical Industrial Vocational and Entrepreneurship Training



▶ EXECUTIVE SUMMARY

The COVID-19 pandemic is a public health and major economic crisis leading to massive labour market disruptions. Kenya lost over 1.2 million jobs in 2020 with the lockdown and curfews in key areas such as Nairobi¹. According to a Ministry of Health and Population Council study², almost half (48%) of participants surveyed had partially lost their income (up from 42% in May) and 39% had completely lost their income (compared to 43% in May). A high proportion (88%) said they were earning less than during the crisis. From this figure, 42% were not receiving any wages and another 40% were earning half to three-quarter of their previous wages.

The following research methods were employed:



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

Employer and individual surveys of the targeted sectors were administered. The questionnaires were developed by the International Labour Organisation (ILO) and standardised to enable cross-country comparisons. The surveys were administered online and via telephone. There were 158 returns for the enterprise survey and 440 for the individual survey.



Stakeholder consultations

In-depth interviews with representatives of key private sector organisations in the targeted sectors, state policymakers, the social partners, and civil society organisations were held. These included the Ministry of Education, Ministry of Health, Ministry of Labour and Social Protection, Ministry of Trade and Tourism, Central Organisation of Trade Unions, Technical Industrial Vocational and Entrepreneurship Training (TIVET) Directorate, and private accommodation and food services and education sector players.



Sector and group selection

The selection of the sectors was made through an examination of economic and labour market data and consultation with the Nairobi ILO office and stakeholders, such as public officials, policymakers, social partners, and private sector role-players. The sectors were selected based on the most and least affected by the pandemic. Therefore, the manufacturing, education, and accommodation and food services sectors were selected for this study. In terms of groups, employees needing training, reskilling, and upskilling were selected.

¹ [www.GeoPoll.com/The Financial Impact of Coronavirus in Sub-Saharan Africa](http://www.GeoPoll.com/The-Financial-Impact-of-Coronavirus-in-Sub-Saharan-Africa).

² Kenya: COVID-19 Perceptions, Stigma and Impact: Responses from the fourth round of data collection in five Nairobi informal settlements (Kibera, Huruma, Kariobangi, Dandora, and Mathare) June 13-16, 2020.



EDUCATION SECTOR

The education sector, especially private institutions, were severely affected by the COVID-19 pandemic. The lockdown led to the closure of all educational institutions. It disrupted the academic calendar. There was a loss of teaching and learning time. Many teachers and support in private institutions were either furloughed or retrenched. Private institutions effectively lost their only source of revenue – student fees. Some private institutions closed permanently.

The education sector appeared ill-prepared for the crisis and ensuing lockdown. Most teachers and lecturers were not equipped to provide online learning to students, with challenges including the lack of connectivity, data, hardware, and software, as well as pedagogic skills to deliver lessons through the online medium. There was a lack of training for teachers on health and safety protocols. Teachers were also not given training to enable them to cope during and after the pandemic. Students faced similar challenges, including the lack of connectivity, data, hardware, software, and digital skills to learn through online platforms. Schools also lack a digital infrastructure to make online learning available.

Several thousand private primary and secondary schools subsequently closed since they rely on school fees to run their operations, unlike public schools which receive state funding. About 57% of the education staff were working from home. There has also been a decrease in working hours since the COVID-19 crisis. Salaries stayed the same for most of those still employed in the sector (65%).

While employees needed to adapt to the health crisis, in up to 43% of the education establishments covered by the survey they felt they were not well prepared, while in another 29% they felt they were not at all prepared to deal with the changes. Employment is expected to decrease, but should increase in the recovery, albeit to below pre-COVID-19 levels.

Approximately 36% of the employers surveyed provided training to their employees to deal with any new working arrangements. Apart from health and safety, 62% of the individuals surveyed did not receive any other training to ensure that they have the necessary skills to do their job during the COVID-19 crisis.

Most education employees would have liked to be trained in the use of digital communication technologies using Zoom, MS Teams, Skype, WhatsApp, and Google Meet. However, 35% of the individuals surveyed did receive training to help them to keep their jobs after the COVID-19 crisis. The changes brought about by the crisis will affect the demand for skills in up to 84% of the education sector establishments.

About 74% of institutions experienced difficulties in providing training to employees. The main reason for this was training costs, while some found it difficult to find external trainers (18%), and others (12%) experienced difficulties in finding people in their organisations able to do the training.



Recommendations

The following actions are recommended:

- ▶ Train teachers and lecturers to use digital communication technologies such as Zoom, MS Teams, Skype, WhatsApp, and Google Meet.
- ▶ Provide basic computer literacy training for teachers to maintain internet connections, use a computer, and surf the web for teaching resources.
- ▶ In-service training for existing teachers and pre-service training for student teachers should be given on delivering teaching using online applications such as word processing, spreadsheets, database management, e-presentation skills, internet navigation, and email management skills.



MANUFACTURING SECTOR

The manufacturing sector was also severely affected by the pandemic and lockdown. Manufacturing activity slowed down due to a lack of imported raw materials, a decline in exports, closure of the borders, and low demand locally and abroad. Many workers lost their jobs. Some small and medium enterprises (SMEs) that lacked a cash flow were forced to close. The most vulnerable that lost jobs were casual, temporary, and low-skilled workers.

Although manufacturing establishments applied health and safety protocols to minimise the spread of the virus, many SMEs were ill-prepared to migrate to e-commerce. There was insufficient training given to workers to prepare them for work during and after the crisis. While office staff were able to work remotely, it was not possible for blue-collar workers on the manufacturing line.

Employees worked mostly on-site (77% of those surveyed), while 18% worked from home. Since the end of 2019, employment has decreased in 44% of the establishments. The decrease in employment has been most significant among manual workers (47%).

Likewise, among the manual workers, the number of hours individuals typically worked have either decreased (46%) or stayed the same (46%). Two-thirds (60%) of manufacturers found it quite difficult to provide training to staff so that they might work from home.

The most common training received included delivering goods and services to customers in new ways, and job- or occupation-specific technical skills. About 50% of employees would have liked training on working in teams. Only 32% received training which will help them to keep their jobs after the COVID-19 crisis. The changes brought about by the crisis will affect the demand for skills in up to 57% of the establishments, with such skills including the ability to manage a wider range of tasks than before, and information and communications technology (ICT) skills among the general workforce being more important.



Recommendations

The following actions are recommended:

- ▶ Train office staff to use digital communication technologies such as Zoom, MS Teams, Skype, WhatsApp, and Google Meet.
- ▶ Train blue-collar workers in job-specific technical skills and multiskilling.
- ▶ Train manufacturing employees at various occupational levels in communication, time management, marketing, sales, customer relations, problem-solving, listening, critical thinking, and collaboration.
- ▶ Invest in innovation, localisation, and local beneficiation, complemented by skills training at all occupational levels.
- ▶ Develop workers to produce personal protective equipment (PPE), including-surgical masks, sanitisers, and disinfectants.
- ▶ Provide retrenched workers with entrepreneurship training.
- ▶ Devise and implement a skills plan for the manufacturing sector.



ACCOMMODATION AND FOOD SERVICE SECTOR

The accommodation and food services sector was likewise severely affected by the pandemic and lockdown. The tourism and hospitality sector came to a virtual standstill, which had a knock-on effect on hotels, bed and breakfasts, lodges, and caterers.

Most establishments temporarily or permanently closed due to a lack of customers and high operating costs. Many workers in the accommodation and food services sector have been temporarily laid off and most do not expect to return to work. The decrease in employment is most significant for waiters. The sector also experienced a decrease in working hours and employees' salaries.

Most of the establishments surveyed in the sector were mainly serving the local/regional (sub-national regional) markets at the end of 2019. Employees in several establishments surveyed were not well

prepared to deal with the COVID-19 changes. While some employees worked from home in the accommodation and food services sector, working from home has not been an option for most. Not all occupations are suitable for working from home and nor do all individuals live in places with the infrastructure to work from home.

Even though up to 74% of establishments provided health and safety training connected with the crisis to their employees, most found it difficult to conduct the training. Most of the individuals surveyed in the sector have not received any training to ensure that they have the necessary skills to do their job during the COVID-19 crisis. The waiters, who are the most severely affected, need training on how to safely serve customers.



Recommendations

The following actions are recommended:

- ▶ Train office staff to use digital communication technologies such as Zoom, MS Teams, Skype, WhatsApp, and Google Meet.
- ▶ Train administration and management staff to use e-commerce (e-tourism) applications to support the recovery of the sector.
- ▶ Train employees at various occupational levels in customer service, communication, time management, digital marketing and advertising, sales, supervision, problem-solving, listening, negotiation, and international business.
- ▶ Invest in innovation, inbound tourism, and domestic tourism, complemented by skills training at all occupational levels.
- ▶ Expand training in occupational health and safety.
- ▶ Provide retrenched workers with training in entrepreneurship and tour guiding.
- ▶ Devise and implement a skills plan for the accommodation and food services sector.

1. Background

The COVID-19 pandemic is a public health and major economic crisis leading to massive labour market disruptions. According to the ILO Monitor released on April 7, 2020, the latest global estimates are that working hours will decline by 6.7% in the second quarter of 2020, equivalent to 195 million full-time jobs. The COVID-19 pandemic crisis is affecting the world's workforce of 3.3 billion and several sectors are facing catastrophic losses, which are resulting in the loss of jobs, wages, and incomes, especially for the workers without social protection.

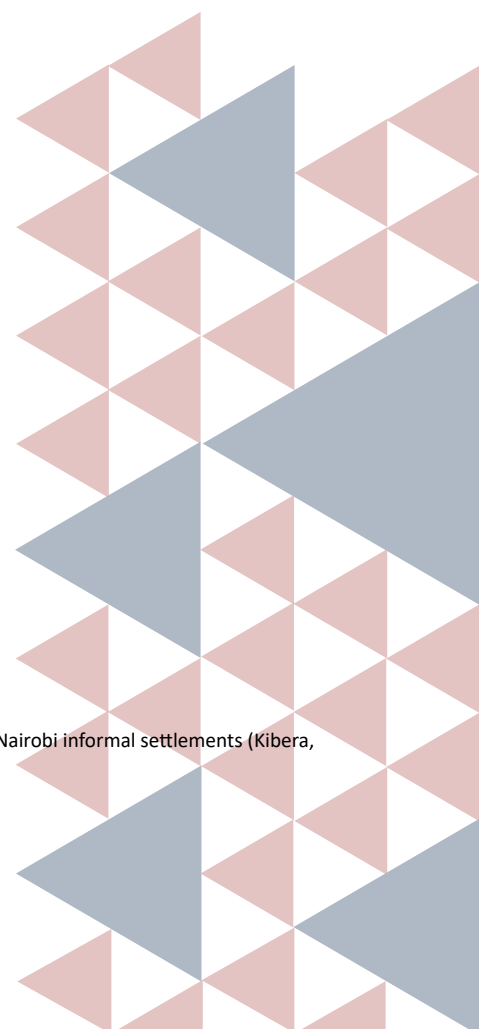
The ILO estimates that 1.25 billion workers are at a high risk of sudden layoffs, reductions in wages and working hours. Many of these workers are in low-paid, low-skilled jobs, where a sudden loss of income has devastating implications. Africa faces major health and economic challenges due to higher levels of informality and weak social protection systems.

Kenya lost over 1.2 million jobs in 2020 with lockdowns and curfews in key areas such as Nairobi.³ According to a Ministry of Health and Population Council study⁴, almost half (48%) of participants had partially lost their income (up from 42% in May) and 39% had completely lost their income (compared to 43% in May). A high proportion (88%) said they were earning less than during the crisis. From this figure, 42% were not receiving any wages and another 40% were earning half to three-quarter of their previous wages.

Against this background, the SIFA Skills Anticipation Project conducted a rapid assessment to collect information that can help identify the skills needs arising from the impact of the COVID-19 pandemic and to identify the reskilling and up-skilling needs of specific sectors of the Kenyan labour force. The economic sectors targeted in this rapid assessment are education, manufacturing, accommodation and food services.

³ [www.GeoPoll.com/The Financial Impact of Coronavirus in Sub-Saharan Africa](https://www.GeoPoll.com/The-Financial-Impact-of-Coronavirus-in-Sub-Saharan-Africa).

⁴ Kenya: COVID-19 Perceptions, Stigma and Impact: Responses from the fourth round of data collection in five Nairobi informal settlements (Kibera, Huruma, Kariobangi, Dandora, and Mathare) June 13-16, 2020.



2. Methodology

Method: 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: Employer and individual surveys of the targeted sectors were administered. The questionnaires were developed by the ILO and standardised to enable cross-country comparisons. The surveys were administered online and via telephone. There were 158 returns for the enterprise survey and 440 for the individual survey.

Stakeholder consultations: In-depth interviews with representatives of key private sector organisations in the targeted sectors, state policymakers, the social partners, and civil society organisations were held. These included the Ministry of Education, Ministry of Health, Ministry of Labour and Social

Protection, Ministry of Trade and Tourism, Central Organisation of Trade Unions, Technical Industrial Vocational and Entrepreneurship Training (TIVET) Directorate, private accommodation and food services, and education sector players.

Sector and group selection: The selection of the sectors was made through an examination of economic and labour market data and consultation with the Nairobi ILO office and stakeholders, such as public officials, policymakers, social partners, and private sector role-players. The sectors were selected based on the most and least affected by the pandemic. Therefore, the manufacturing, education, and accommodation and food services sectors were selected for this study. In terms of groups, employees needing training, reskilling, and upskilling were selected.

3. Contextual factors

This section outlines the impact of the pandemic on the targeted sectors and group of individuals in terms of their operations, markets, supply chains, employment, unemployment, and underemployment. It also discusses the likely longer-term impact of the pandemic on each target sector and group of individuals once the crisis ends, taking account of scenarios under which COVID-19 either continues to be a threat or ceases to be an issue.

3.1 Most affected sectors

It is evident from stakeholder consultations that the tourism, accommodation and food services, manufacturing, education, and horticulture sectors were the most adversely affected by the pandemic in Kenya. For example, a representative of the Federation of Kenya Employers revealed that the most affected sub-sectors are “the restaurants, hotels, accommodation, and tourism; activities that cannot work well with social distancing.”

In the education sector, many private primary and secondary schools closed due to a lack of revenue as they solely rely on school fees to run their operations. This had a disastrous effect on staff and learners.

3.2 Employment, underemployment, and unemployment

Current employment situation: Since the onset of the COVID-19 pandemic, from the 440 individual employees surveyed, 8% were on leave, 4% temporarily laid off and do not expect to return to work, 11% temporarily laid off but expect to return to work, 40% worked on site, and 35% worked from home.

Approximately 77% of workers in the manufacturing sector worked on site, while around 26% of workers in the tourism, accommodation, and food services sectors have been temporarily laid off and expect to return to work.

About 41% of the establishments surveyed reported that they were operating below capacity, of which 50% were in accommodation and food services activities and 46% in the education sector.

A member of the Kenya Private Schools Association stated that many teachers were working remotely. Some private schools have turned to online classes to maintain the academic calendar. However, private schools serving low-income communities were unable to migrate to online learning.

Table 1: Current employment situation in percentages

Sectors	Thinking about your employment now, what best describes your current employment situation? (n = 246)					
	Don't know	On leave	Temporarily laid off and do not expect to return to work	Temporarily laid off but expect to return to work	Working at the usual place of work	Working from home
Accommodation and food service activities		11	11	26	37	16
Education	2	11	4	11	16	57
Manufacturing				5	77	18
All sectors	3	8	4	11	40	35

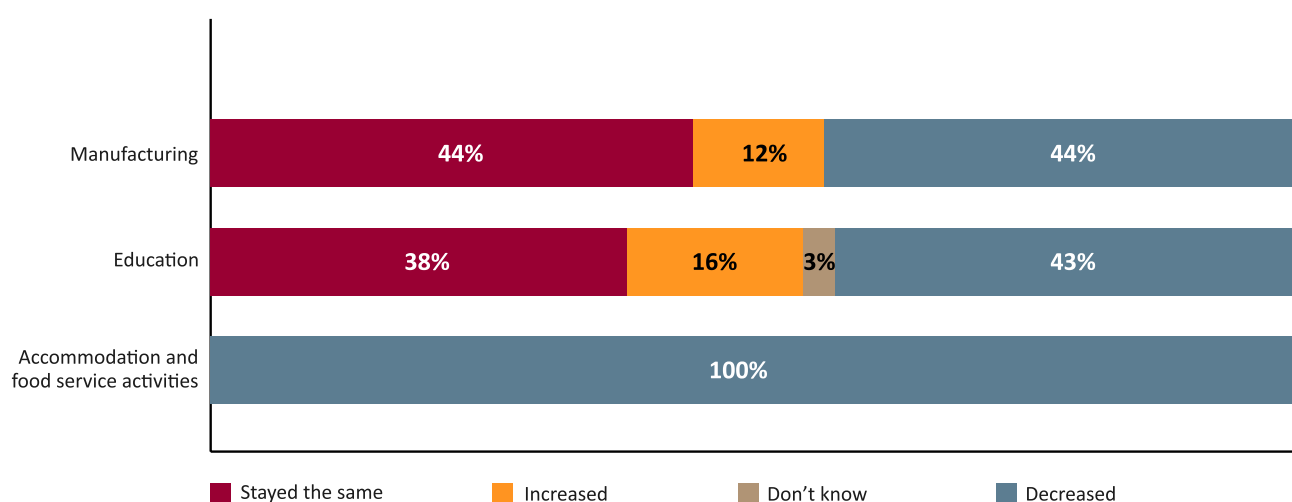
Source: Individual survey (Sept 2020)

Changes in employment: Since the start of the crisis in 2020, employment in all accommodation and food service establishments have decreased. In the manufacturing sector, there was a decrease of 44% in employment, while 44% stated that employment levels are unchanged.

Employment in private education decreased by 43% while 38% stated that employment stayed the same.

People are no longer going to the eateries and bars leading to job losses. One interviewee remarked that “the hotel industry is on its death bed and may not recover unless the government intervenes and provides stimulus packages to revive the industry.” This crisis has resulted in the closure of hotels. There was a decrease of 38% in the education sector.

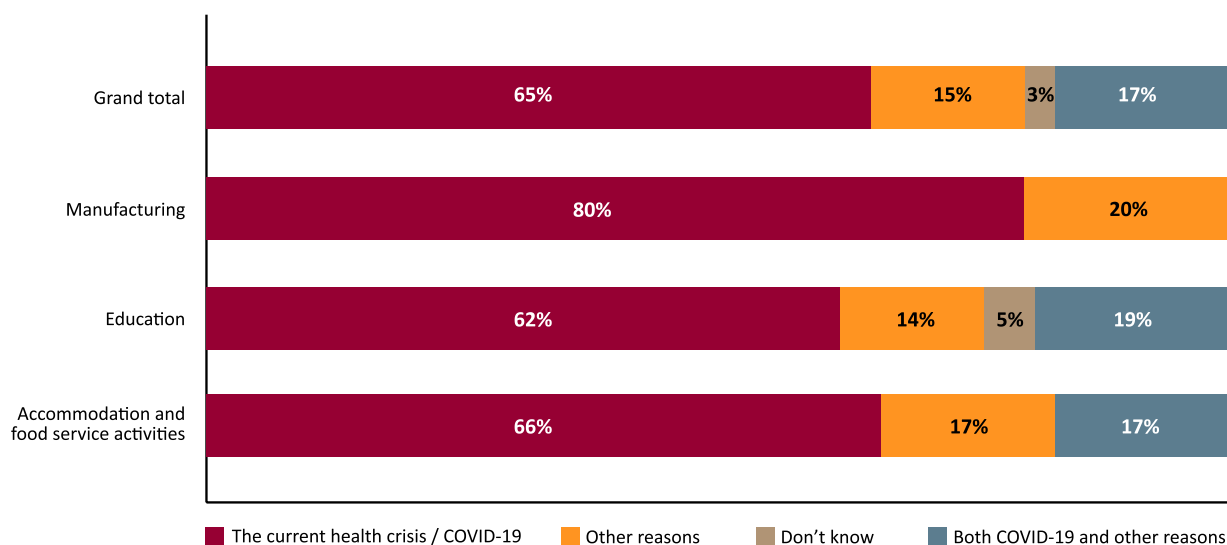
Figure 1: Changes in employment: End of 2019 to Sept. 2020 (n=89)



Source: Employer survey (Sept 2020)

The main reasons for the reduction in employment are the COVID-19 pandemic. Overall, employers stated that the main cause for lowering employment levels was the COVID-19 (65%). In manufacturing, the figure is 80%; education 62%; and accommodation and food services 67%.

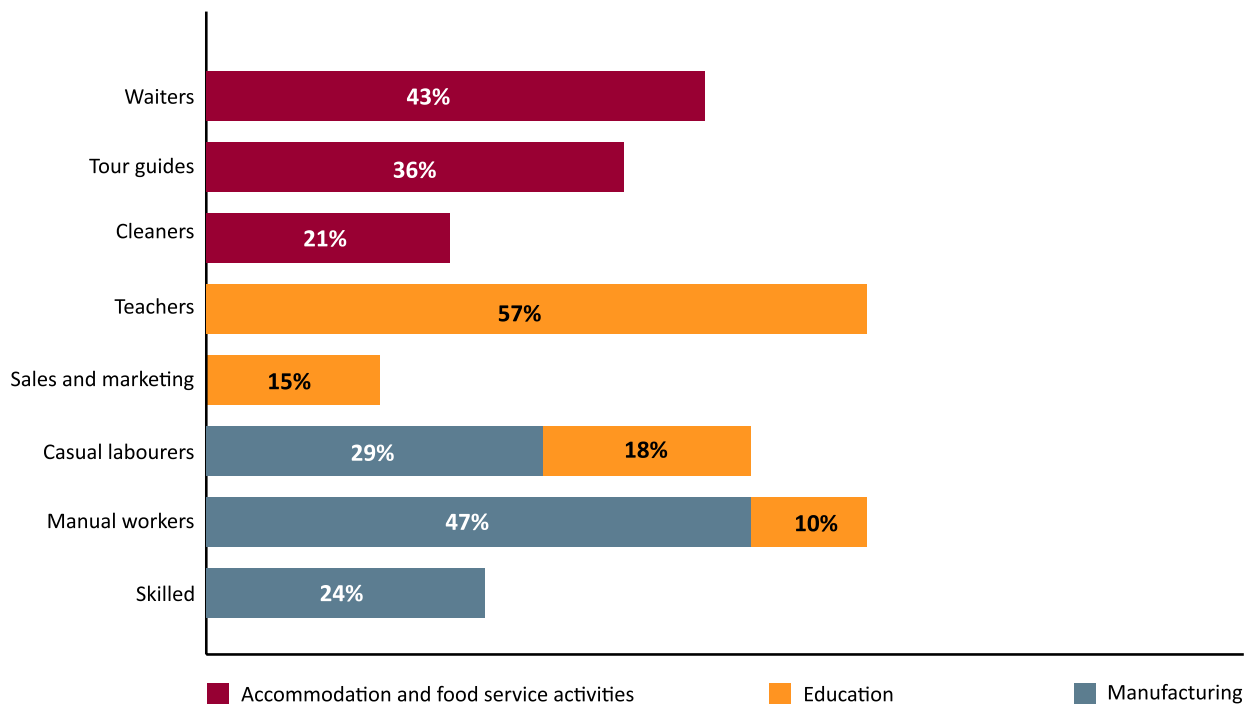
Figure 2: Reasons for reduction in employment (n=88)



Source: Employer survey (Sept 2020)

The reduction in employment has also varied by type of jobs in the most adversely affected sectors. In the manufacturing sector, the decrease in employment has been most significant among the manual workers surveyed (47%) while in the accommodation and food services activities it has been most significant among the waiters surveyed (43%). There was a 57% reduction in employment for teachers.

Figure 3: Occupation categories with the most significant decrease in employment (n=89)



Source: Employer survey (Sept 2020)

Changes in work hours: The number of hours individuals typically work has mostly decreased (64%) with 19% reporting that it stayed the same. There was a significant decline in working hours in accommodation and food services (63%); education (89%) and manufacturing (46%).

Table 2: Changes in working hours in percentages

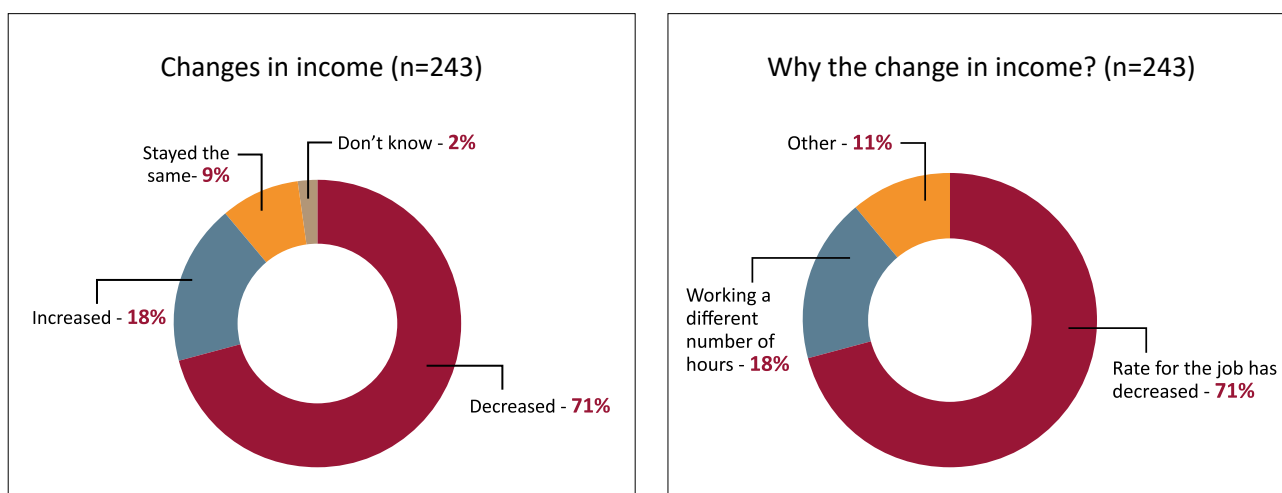
Sectors	Since the COVID-19 crisis has the number of hours you typically work (n=244)			
	Decreased	Do not know	Increased	Stayed the same
Accommodation and food service activities	63		21	16
Education	89	4	2	5
Manufacturing	46		8	46
All sectors	64	2	15	19

Source: Employer survey (Sept 2020)

Changes in incomes and reasons: Most workers surveyed had experienced income changes due to the pandemic. There was a decrease in income for 71% of the individuals surveyed while 9% reported that the income remained the same. The reason in 71% of cases was a decrease in the rates of jobs while 18% indicated that they worked different hours resulting in a decreased income.

An interview with a Senior Labour Inspector in the Ministry of Labour and Social Protection confirmed that the country has witnessed job cuts across various sectors, and incomes of businesses and available working hours for staff have fallen significantly.

Figure 4: Changes in incomes and reasons



Source: Employer survey (Sept 2020)

3.3 Business conditions and markets

Markets: The employer survey indicated that most of the establishments in the accommodation and food service (40%), education (53%), and the manufacturing (72%) sectors were mostly serving the local/regional markets.

Table 3: Markets for the goods and services in percentages

Sectors	At the end of 2019, approximately what percentage of the goods and services the establishment produced was exported? (n=86)				
	International	Local / regional (sub-national regional)	Local / regional (sub-national regional), National, International	National	National, International
Accommodation and food service activities	20	40	20		20
Education	6	53		41	
Manufacturing	14	72			14

Source: Employer survey (Sept 2020)

Establishments that export products were severely affected by the suspensions of international flights and low demand in target markets. At the start of the pandemic, the flower sector in Kenya lost an estimated KES 250m per day and is estimated to lose half of its value (KES 60bn) by end of 2020. Approximately 30 000 temporary workers have been laid off and another 40 000 permanent staff sent on unpaid leave.⁵

A Chief of Staff in the Tharaka Nithi County confirmed that the horticulture (agribusiness) sector was most affected by COVID-19 since it is dependent on foreign markets. The enterprise survey indicated that 50% of the sectors did not export while only 3% of establishments exported 75% or more of the products. About 17% exported between 50-74% of products.

Table 4: Percentage exported

Sectors	At the end of 2019, approximately what percentage of the goods and services the establishment produced was exported? (n=86)					
	0%	1 to 24%	25 – 49%	50 – 74%	75% or more	Do not know
Accommodation and food service activities	60			20	20	
Education	47		12	12		29
Manufacturing	60	20	20			
All sectors	50	5	7	17	3	18

Source: Employer survey (Sept 2020)

⁵ American Chamber of Commerce, Kenya. Assessing The Impact of The Covid-19 Pandemic on Kenya's Economic and Business Environment. Report and Recommendations for Enhancing Business Continuity, July 2020.

Business situation: Most (33%) of the businesses had been expanding within existing markets while 24% had been expanding into new markets in the three years up to the end of 2019. Only 6% of the establishments had been contracting while in 15% there was not much change.

businesses in the accommodation and food service activities (50%) had been expanding into new markets in the three years up to the end of 2019, when most of those in the manufacturing sector (55.6%), had been expanding within their existing markets as shown in the table below.

Confirming the observations by the Chairman of the Western Kenya Hospitality Leaders Association, the employers' survey indicated that half of the

Table 5: Situation in establishments in the three years up to the end of 2019

Sectors	Thinking about the three years up to the end of 2019, what best describes the situation in the establishment you work for? (n=84)					
	Don't know	Business contracting	Business expanding into new markets	Business expanding in new markets and existing markets	The business had been expanding within its existing markets	There was not much change
Accommodation and food service activities		3	50	25	25	
Education	18	3	15	15	31	18
Manufacturing			22	11	56	11
All sectors	10	6	24	12	33	15

Source: Employer survey (Sept 2020)



4. Findings

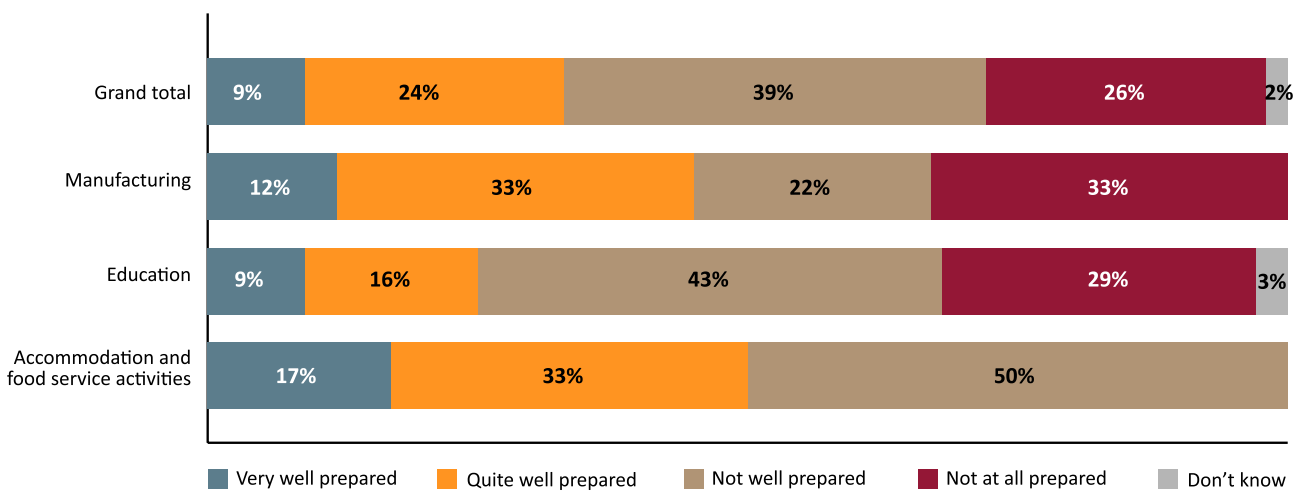
This section reviews the overall public policy, sector development strategies, active labour market policies and business strategies needed to achieve the best feasible outcome for employment in the target sectors, and for getting target groups of individuals into employment.

4.1 Operating effectively while the pandemic continues

Dealing with the changes: The onset of the pandemic was swift and severe. It came without much warning. The enterprise survey confirmed that 39% of employees were not well-prepared and another 26% were not at all prepared to deal with

the changes which affected how they have had to work during the current crisis. In the manufacturing sector, 22% were not well-prepared, while in education and accommodation and food services the figures are 43% and 50% respectively.

Figure 5: Preparedness to deal with changes (n=87)

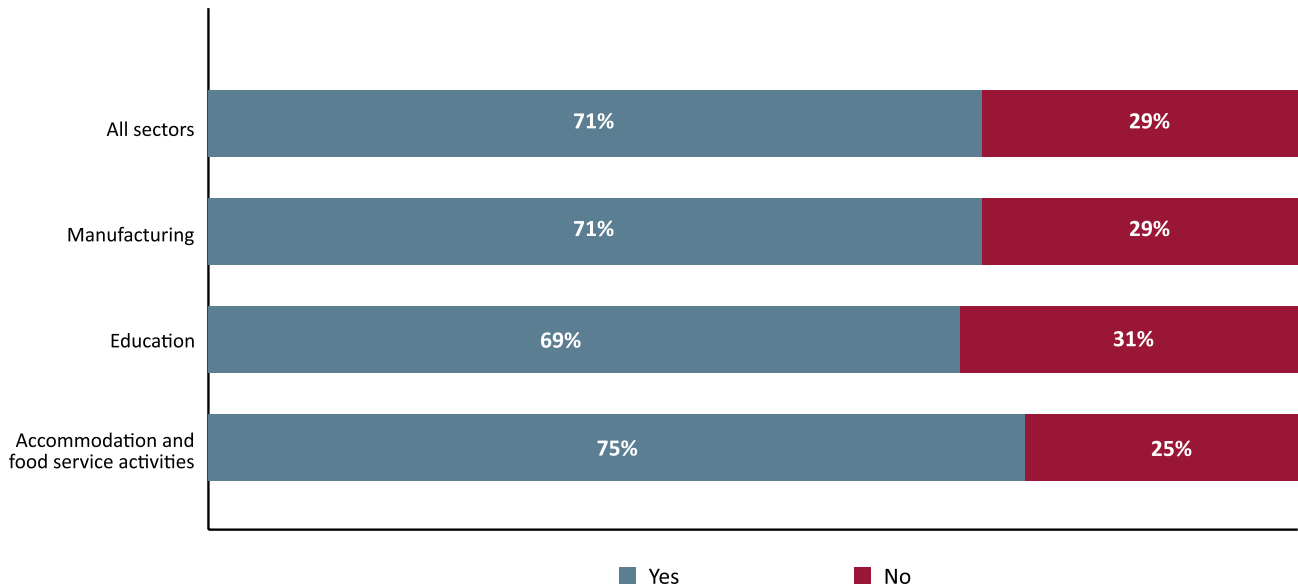


Source: Employer survey (Sept 2020)

Since the start of the COVID-19, most of the individuals surveyed (71%) had received information about working during the crisis. However, in the education sector, 31% did not receive any information while the figure for accommodation and food services was 29%.

A private school representative reiterated that not much had been done to communicate to their staff about working during the crisis owing to the unpredictable nature of the pandemic, lack of adequate information, and funds to support such initiatives.

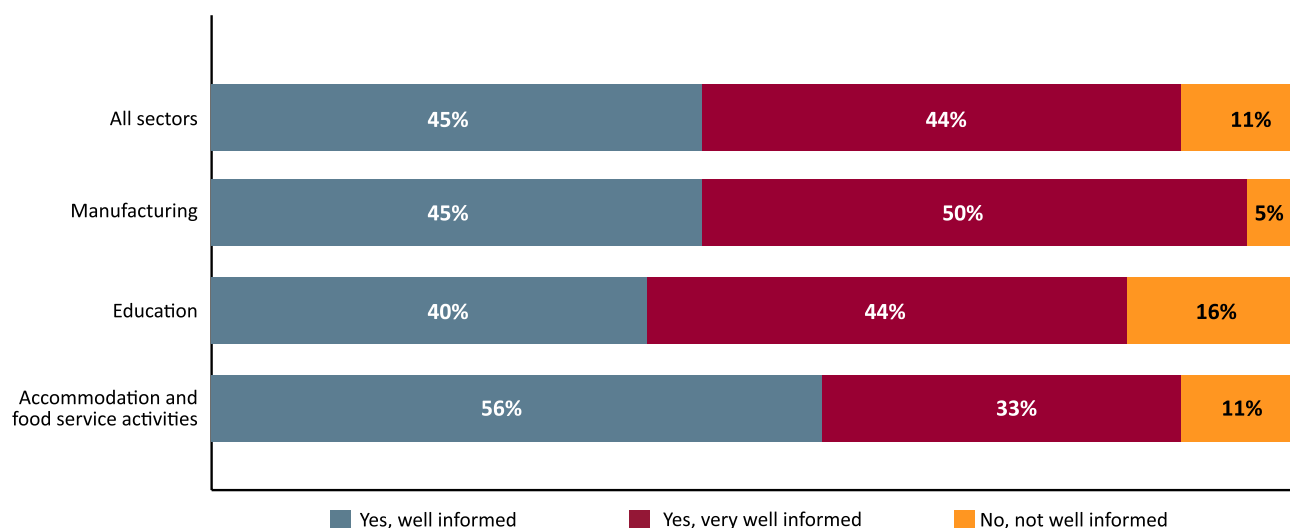
Figure 6: Information about working during crisis (n=241)



Source: Employer survey (Sept 2020)

Majority of the respondents (45% very well informed, 44% Well informed) felt sufficiently informed about how to protect themselves and their fellow workers from COVID 19. Only few (12% of the individuals) did not feel well -informed enough about how to protect themselves or their fellow workers from COVID-19 whilst at work. A representative of the Central Organisation of Trade Unions (COTU) acknowledged that nationwide awareness on control and prevention measures is needed to demystify misinformation.

Figure 7: Information about protection from COVID-19 while at work (n=244)



Source: Employer survey (Sept 2020)

Working from home: Employers have implemented working from home protocols as preventive measures and in response to the state directive that restricts face-to-face contact. About 48% of establishments indicated that employees are working from home some of the time and another 12% all the time. A smaller percentage of employees in the education and accommodation and food services sectors are working from home.

Table 6: Working from home in percentages

Sectors	Since the COVID-19 crisis started, have workers been working from home? (n=88)			
	Don't know	No	Yes, all the time	Yes, some of the time
Accommodation and food service activities		33		67
Education	5	29	23	43
Manufacturing		25		75
All sectors	2	38	12	48

Source: Employer survey (Sept 2020)

Communication with colleagues: Working from home is not an option in some industries and occupations. Moreover, employees may live in areas without bandwidth or tools to work remotely.

A trade union representative mentioned that although digital platforms existed before COVID-19, workplaces were not yet prepared to migrate operations to digital platforms.

Notwithstanding, 84% of employees had to communicate with colleagues a little or much more online. This has been more so for those in the education sector as shown in the table below.

Table 7: Communication using online platforms in percentages

Sectors	Have you had to communicate more with your colleagues using online platforms than before COVID-19? (n=242)					
	A little less	A lot less	About the same	Don't know	Yes, a little more	Yes, very much more
Accommodation and food service activities	11	6	11		44	28
Education	4	2	2	2	27	63
Manufacturing		9	18		27	45
All sectors	4	4	7	1	29	55

Source: Employer survey (Sept 2020)

Training to work from home: Establishments needed to implement working from home arrangements to continue with business activities, maintain productivity, and preserve jobs while safeguarding the health of workers. This has significantly changed the way people work.

The Education Secretary in the State Department of Post-Training Skills Development mentioned that the department instructed teachers/lecturers to work from home after COVID-19 cases were identified.

Working from home requires training, hardware, software, and interconnectivity. Around 40% of establishments found it quite difficult to provide staff training to work from home. Those in the accommodation and food services sector have found it either very difficult (60%), or quite difficult (40%) to provide staff training. In manufacturing, 80% of employers found that working from home is not a possibility.

Table 8: Training staff to work from home

	Generally speaking, how easy has it been to provide training to staff so that they might work from home? (n=87)			
Sectors	Not at all difficult	Not difficult	Quite difficult	Very difficult
Accommodation and food service activities			40%	60%
Education	19%	12%	38%	31%
Manufacturing		20%	60%	20%
All sectors	10%	21%	40%	29%

Source: Employer survey (Sept 2020)

4.2 Taking advantage of opportunities during the time of the pandemic

Employer firms: In the next six to twelve months, 31% of employers expect employment to decrease and 49% are optimistic that employment will increase.

Table 9: Future changes in employment

	Thinking about the next six months, do you expect employment to....? (n=84)					
Sectors	Decrease, a great deal	Decrease, a little	Don't know	Increase to above pre-COVID-19 levels	Increase, but to below pre-COVID-19 levels	Return to pre-COVID-19 levels
Accommodation and food service activities		50		17	33	
Education	6	23	14	14	29	14
Manufacturing		37	15	37		11
All sectors	10	21	10	22	27	11

Source: Employer survey (Sept 2020)

Opportunities: In the next twelve months, 51% of employers see opportunities while 28% are negative. The accommodation and food services and education sectors are less optimistic.

Table 10: COVID-19 related issues providing opportunities

Sectors	In the next 12 months, are there any COVID-19 related issues that might provide opportunities for this establishment? (n=86)		
	Don't know	No	Yes
Accommodation and food service activities	17%	67%	16%
Education	23%	37%	40%
Manufacturing	38%	12%	50%
All sectors	21%	28%	51%

Source: Employer survey (Sept 2020)

Types of opportunities: The employer survey indicated that the opportunities are mostly in delivery of care services e.g. teaching from home (50%), distributing goods e.g. home delivery services (25%), and in the provision of information on COVID-19 (25%). The opportunities in the education sector are mostly in the delivery of care services i.e. teaching from home (60%) and

the provision of information on COVID-19 (33%) while those for the accommodation and food service activities are mostly distributing goods e.g. home delivery services (90%). Most (57%) of the individuals employed in the education sector who were surveyed are working from home.

Table 11: COVID-19 related opportunities

Sectors	What are those opportunities? (n=86)		
	Delivery of care services (teaching from their homes)	Distributing goods (home delivery services)	Provision of information on COVID-19
Accommodation and food service activities	0%	90%	10%
Education	60%	7%	33%
Manufacturing	0%	99%	1%
All sectors	50%	25%	25%

Source: Employer survey (Sept 2020)

Recruitment: There are opportunities in the delivery of health services (providing services to hospitals and clinics, tracing, and tracking services), production and distribution of healthcare-related products such as ventilators, face masks and cleaning agents. There are also opportunities in e-health. There are a range of imported health products that can be manufactured locally.

In accommodation and food services, there appears to be no need to recruit people. A similar picture prevails for manufacturing. In the case of education, employers (79%) indicated the need to recruit teachers, particularly those that were retrenched.

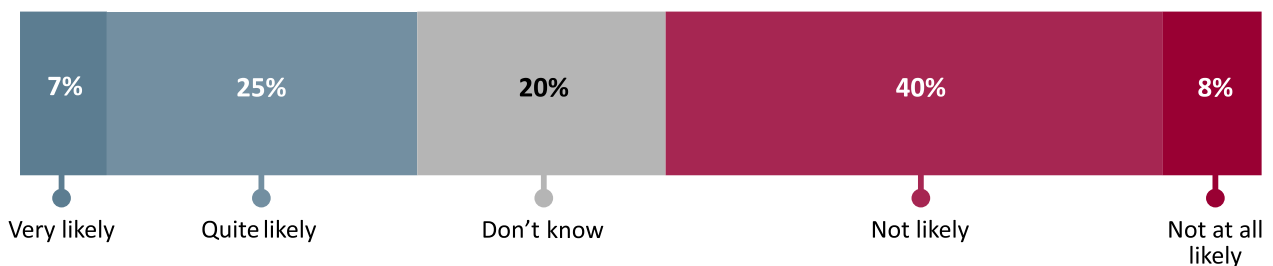
Table 12: Recruitment into new opportunities in percentages

Sectors	Will people need to be recruited to take advantage of these opportunities? (n=92)		
	Don't know	No	Yes
Accommodation and food service activities		100	
Education	7	14	79
Manufacturing		75	25
All sectors	4	33	63

Source: Employer survey (Sept 2020)

Return to employment: Individuals indicated up to 40% of the individuals surveyed are not likely to return to employment within six months. Twenty percent stated that they do not know.

Figure 8: Likelihood of returning to work (n=243)

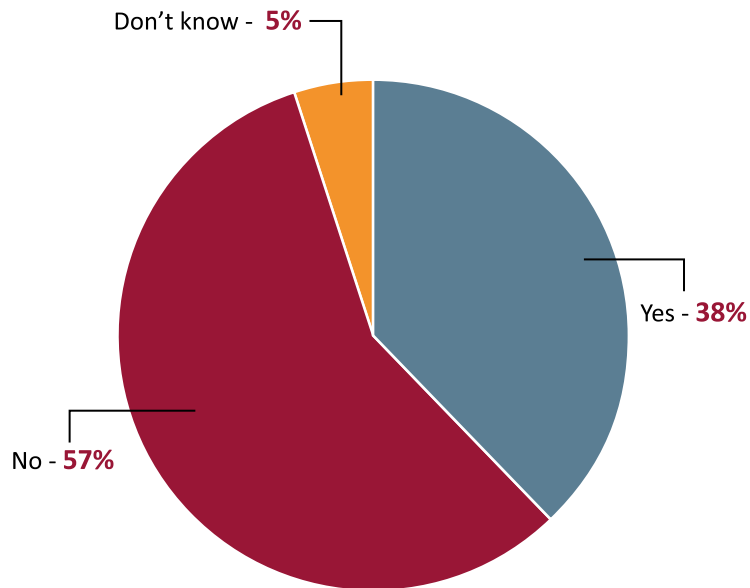


Source: Employer survey (Sept 2020)

Only 38% of individuals indicated that they need to re-train to find a new job.

Figure 9: Need for re-training

Will you need to re-train to find a new job? (n=243)

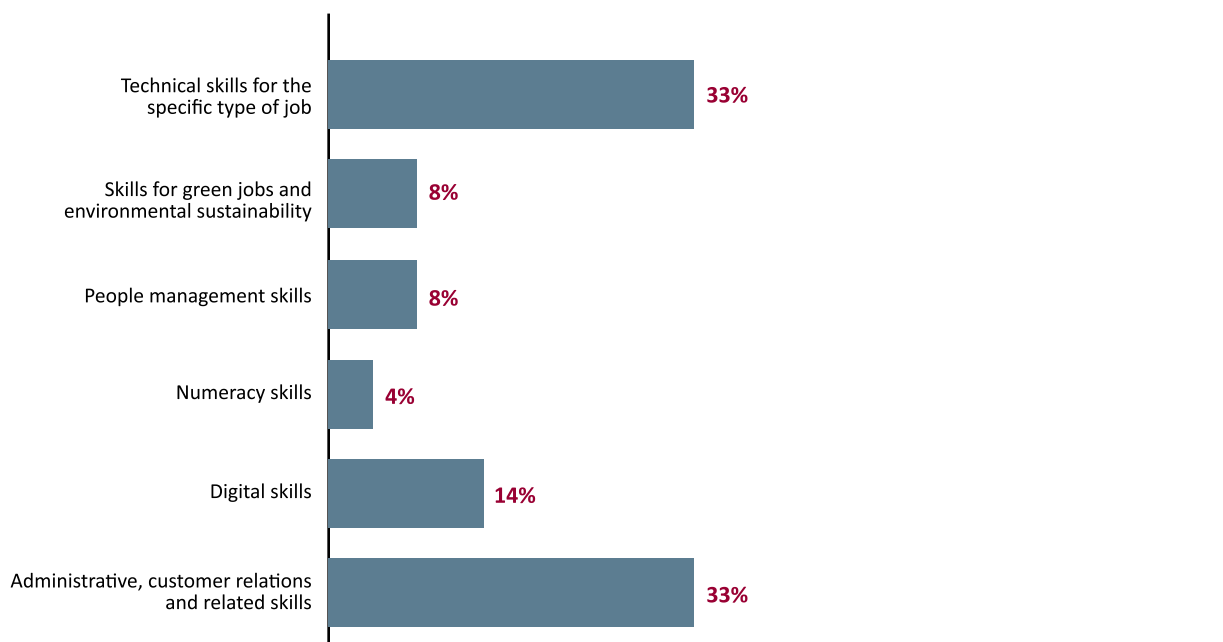


Source: Individual survey (Sept 2020)

Most individuals (33%) stated they needed technical skills training with an equal percentage for administrative, customer relations and related skills.

Figure 10: Training needed

In what will you need, or want to, retrain...? (n=244)

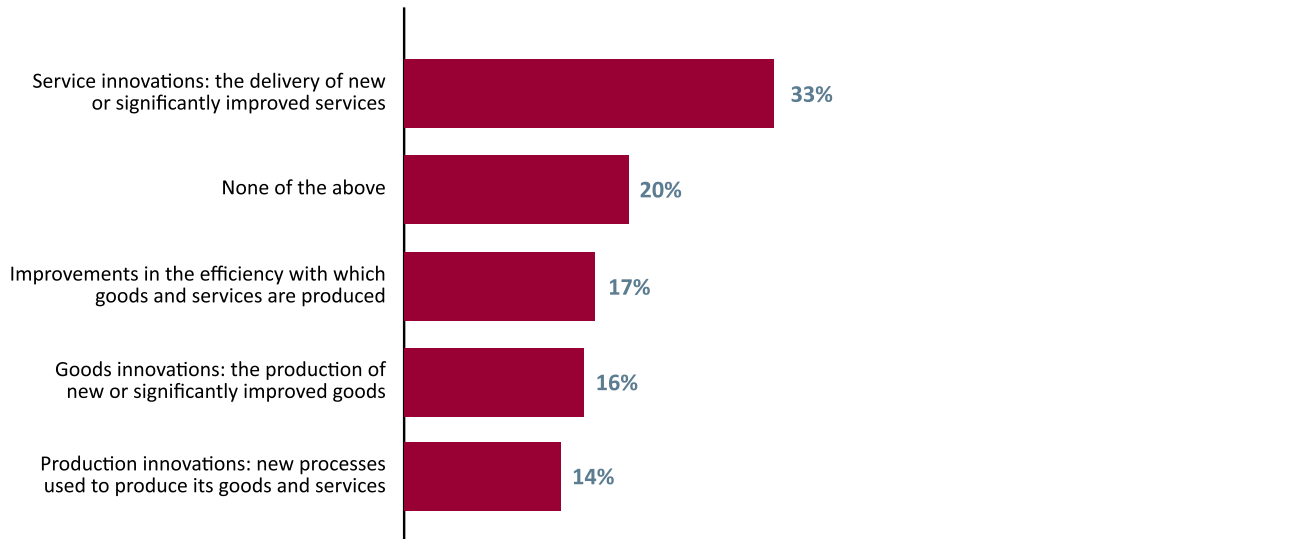


Source: Individual survey (Sept 2020)

4.3 Speeding up and maximising recovery

Employer firms: Product and process innovations positively influence business survival⁶. Twenty-seven percent of employers were engaged in service innovation. Establishments also engaged in goods innovations (16%) and improvements in the efficiency with which goods and services are produced (14%). About 20% reported that there were no innovations. In the three years up to 2019, service innovations (33%) were introduced at workplaces.

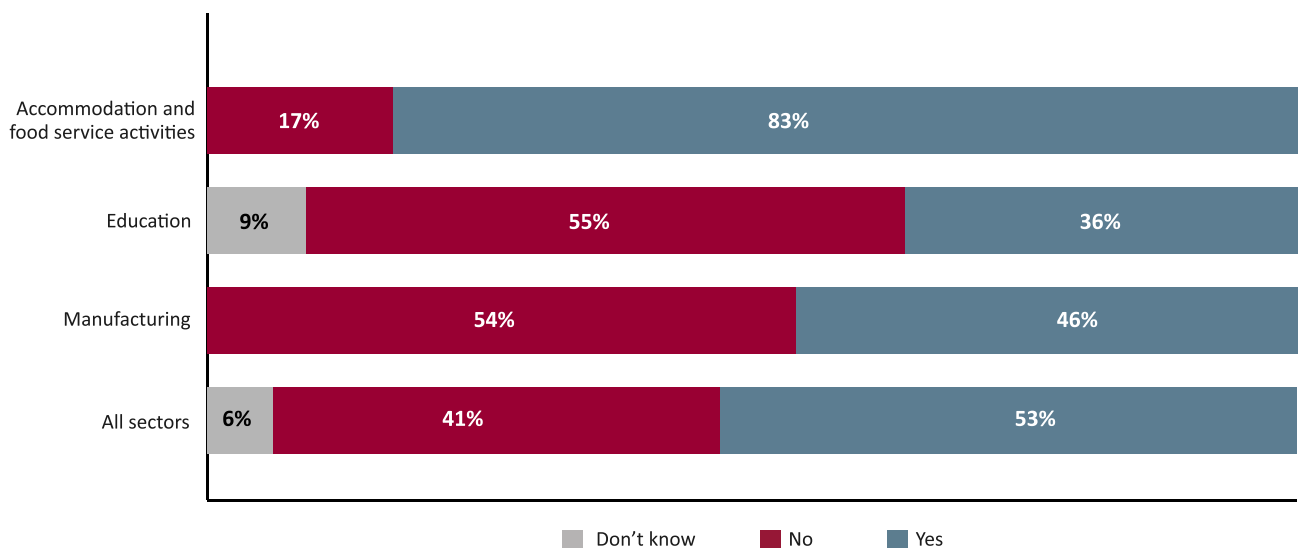
Figure 11: Innovations for the last 3 years (n=87)



Source: Employer survey (Sept 2020)

Training for new working arrangements: Forty-one percent of employers did not provide training to employees to deal with any new working arrangements. In the education sector, 36% provided training to their employees.

Figure 12: Training for new working arrangements



Source: Employer survey (Sept 2020)

⁶ https://www.researchgate.net/publication/324954873_Innovation_and_business_survival_A_long-term_approach Accessed on 4 October 2020.

Training: Up to 51% of the individuals have not received any training (but would like to have some) to ensure that they have the necessary skills to do their job during the COVID-19 crisis. This is especially so for those in the education (62%) sector. At least 41% of those in the manufacturing sector have received training to ensure that they have the necessary skills to do their job during the COVID-19 crisis.

Table 13: Training to have the necessary skills during the COVID-19 crisis

	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? (n=246)		
Sectors	No, but would have liked some	No, not needed	Yes
Accommodation and food service activities	56	11	33
Education	62	2	37
Manufacturing	18	41	41
All sectors	51	12	37

Source: Individual survey (Sept 2020)

Training preferences: Most of the individuals surveyed (31%), especially those in accommodation and food service activities (40%), confirmed they would have liked to be trained in the use of digital communication technologies using Zoom, Teams, Skype, WhatsApp, Google Meet, and so on. Most of those surveyed in the manufacturing sector (50%) stated they would have liked training on working in teams.

Table 14: Training preferences

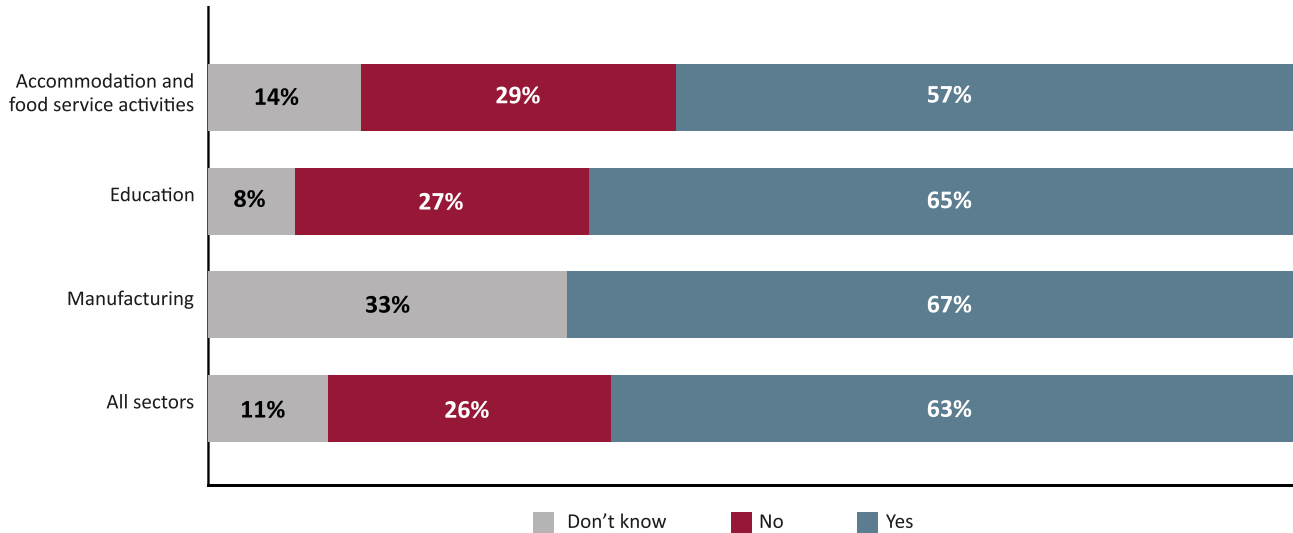
	What training would you have liked? (n=246)							
Sectors	Delivering goods and services to customers in new ways	Job- or occupation-specific technical skills	Managing a wider range of tasks than before COVID-19	Team leading, supervisory or management skills	Undertaking changed operating processes	Use of digital communication technologies such as Zoom, MS Teams, Skype, WhatsApp, Google Meet, and so on	Using digital technologies to maintain internet connectwions, accessing computer resources at work, etc.	Working in teams where not everyone can be in the place of work
Accommodation and food service activities	20			20		40	20	
Education		27	5		5	32	14	18
Manufacturing	25		25					50
All sectors	6	20	6	6	3	31	11	17

Source: Individual survey (Sept 2020)

4.4 Building for the future

Recovery and employment: It is indicated that 63% of the establishments would need to increase the number of employees when the recovery begins. The figure for accommodation and food services was 57%, education 65% and manufacturing 67%.

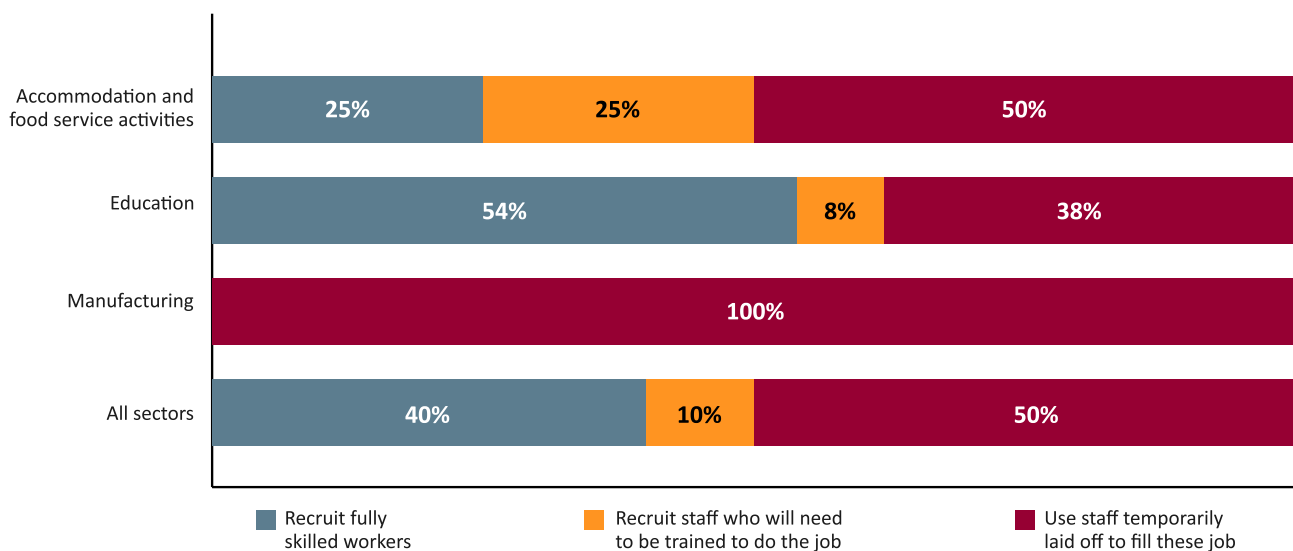
Figure 13: Recovery and employment (n=87)



Source: Employer survey (Sept 2020)

Filling jobs: Establishments will mostly use staff temporarily laid off to fill these jobs (50%). Up to 40% of them will recruit fully skilled workers. All the establishments in manufacturing (100%) will use staff temporarily laid off to fill jobs.

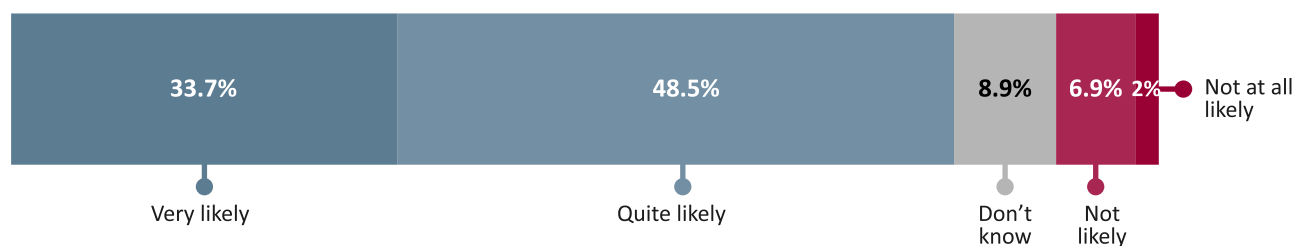
Figure 14: Filling jobs (n=87)



Source: Employer survey (Sept 2020)

Building resilience: Over the short term, it is quite likely that 48.5% of establishments will take measures explicitly aimed at building resilience to future pandemics and other major crises.

Figure 15: Building resilience - (n=83)



Source: Employer survey (Sept 2020)

Current job: Individuals in 46% of the establishments will likely continue to be doing their current jobs in six months; 56% in education and 41% in manufacturing.

Table 15: Current jobs in six months in percentages

Sectors	How likely is it that you will continue to be doing your current job in six months? (n=246)				
	Don't know	Not at all likely	Not likely	Quite likely	Very likely
Accommodation and food service activities	12		25	38	25
Education	4	4	6	30	56
Manufacturing	5	5	18	32	41
All sectors	6	4	12	31	46

Source: Individual survey (Sept 2020)

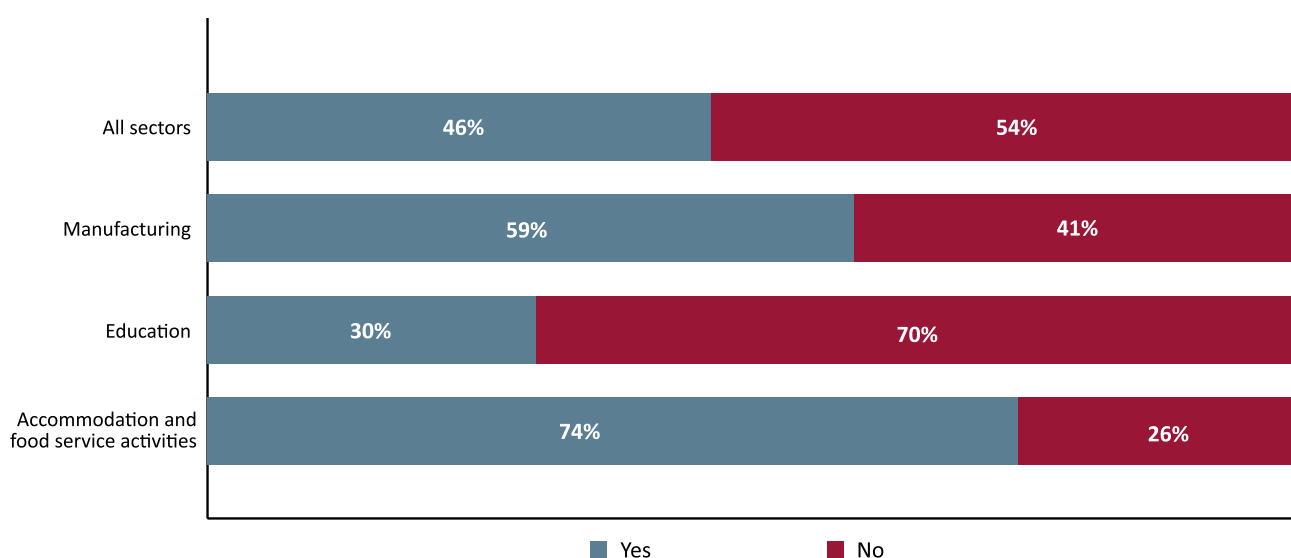
5. Conclusion

The purpose of this section is to discuss the contribution that skills development can make; the skills that are needed for key occupations in the target sectors and individuals; and the options to deliver skills development initiatives.

5.1 Skills development for the safe operation of firms during the pandemic

Health and safety training connected with COVID-19: Since the start of the health crisis, only 46% of the individuals have undertaken health and safety training related to COVID-19. Approximately 74% of individuals surveyed in the accommodation and food services sectors have undertaken health and safety training, 30% of those in the education sector, and 59% in manufacturing.

Figure 16: Health and safety training connected with COVID-19



Source: Individual survey (Sept 2020)

Skills match to current jobs in the COVID-19 period: Most individuals say that their skills were well matched to the needs of their current jobs in the COVID-19 crisis. The ratings lean heavily between 5 and 9.

Table 16: Skills match to current jobs in COVID-19 period

	In general, would you say your skills were well matched to the needs of your current job in the COVID-19 crisis? (Please give your rating on a scale of 1 to 10, where 1 means you have none of the skills required, and 10 means you have all the skills required).							
Sectors	2	3	4	5	6	7	8	9
Accommodation and food service activities				14	21	14	21	29
Education	3	8	8	17	14	28	17	6
Manufacturing	6	6	6	13	0	19	44	6
All sectors	3	7	7	14	12	22	23	14

Source: Individual survey (Sept 2020)

5.2 Skills development for recovery

Training to help keep jobs after the COVID-19 crisis: In the manufacturing sector, 41% indicated they did not receive training to help them keep their jobs after the COVID 19 pandemic but would have liked to. The figures for respondents from the education and accommodation and food services sector who did not receive training was even higher at 61% and 44% respectively. Only thirty-three percent of the individuals surveyed indicated that they had received training to keep them in their jobs after the COVID-19 crisis.

Table 17: Training to help keep jobs after the COVID-19 crisis

	Have you received any training which will help you to keep your job after the COVID-19 crisis? (n=243)			
Sectors	Don't know	No, but would have liked some	No, not needed	Yes
Accommodation and food service activities	6	44	25	25
Education		61	4	35
Manufacturing		41	27	32
All sectors	1	53	13	33

Source: Individual survey (Sept 2020)

Effect of changes on demand for skills: The changes due to the crisis affected the demand for skills in 78% of the establishments, with 84% affected in the education sector.

Table 18: Effect of changes on demand for skills

Sectors	If these changes take place, will it affect the demand for skills? (n=85)		
	Don't know	No	Yes
Accommodation and food service activities		40%	60%
Education	8%	8%	84%
Manufacturing		43%	57%
All sectors	4%	18%	78%

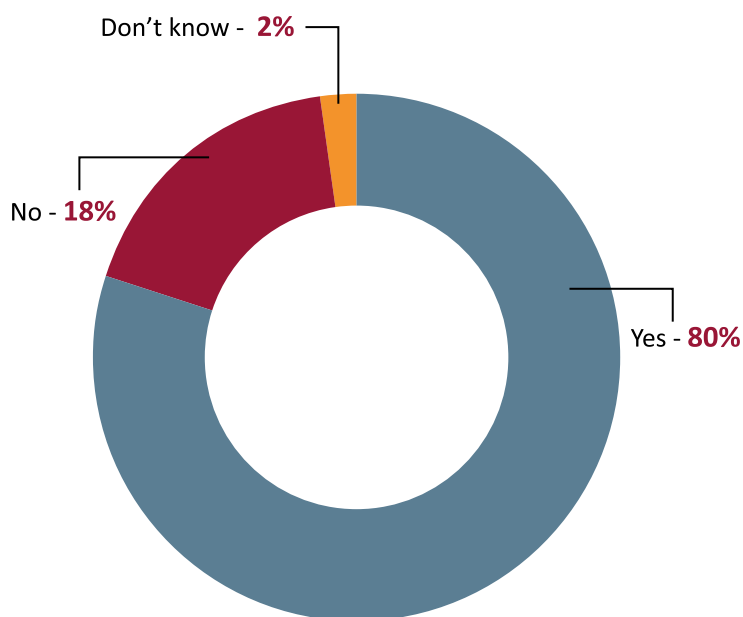
Source: Employer survey (Sept 2020)

The skills that will become more important to the workplace are the ability to manage a wider range of tasks than before and ICT skills.

5.3 Skills development opportunities and changes in industry structure

Training for new opportunities: In 80% of the establishments, staff would need to be trained to take advantage of new opportunities.

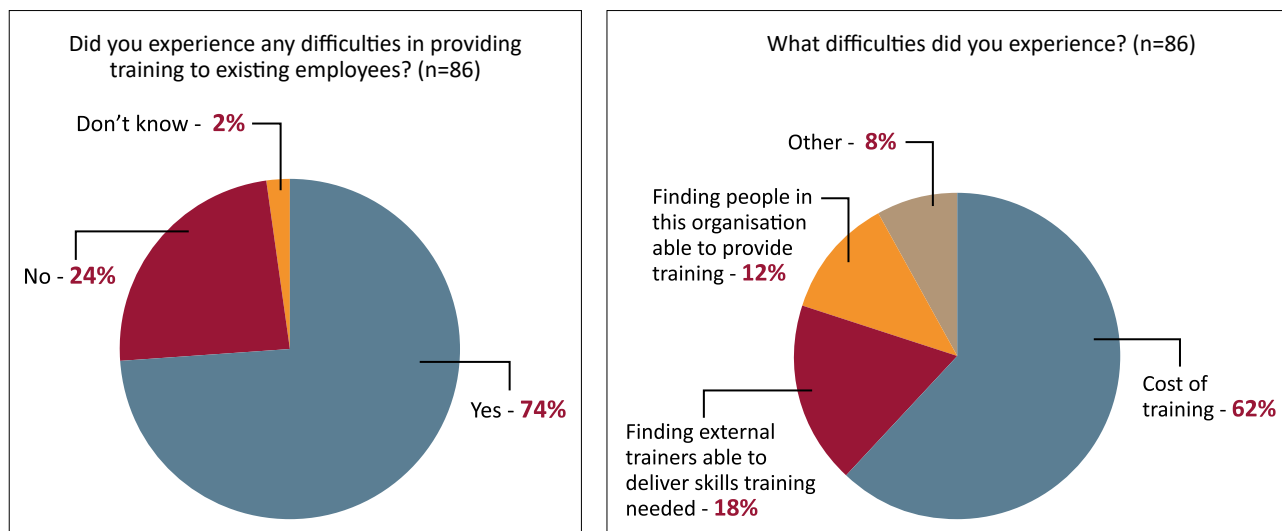
Figure 17: Training for new opportunities



Source: Employer survey (Sept 2020)

Training difficulties and reasons: Up to 74% of the establishments surveyed mentioned that they had experienced difficulties in providing training to existing employees. The main difficulty was the cost of training (62%). Others found it difficult to find external trainers (18%) or experienced difficulties in finding people in their organisations able to provide training (12%).

Figure 18: Training difficulties and reasons



Source: Employer survey (Sept 2020)

5.4 Skills development for employability of workers affected by the pandemic

The major skills needs are job-specific/occupation-specific technical skills (48%) and digital skills (20%) in all mentioned sectors.

Table 19: Skills needs to keep jobs after the COVID-19 crisis

Sectors	Are there any areas where your skills need improving to keep your job after COVID-19 crisis? (n=243)								
	Admin skills	Job-specific technical skills	Manage wider range of tasks	Team leading & supervisory	Changed operating processes	Use digital technologies	Maintain internet connections	Using new equipment	Working in teams
Accommodation and food service activities	17%	50%					17%		17%
Education		36%	8%		4%	32%	4%	4%	12%
Manufacturing	18%	64%		9%				9%	
All sectors	7%	48%	4%	2%	2%	20%	4%	4%	9%

Source: Employer survey (Sept 2020)

6. Recommendations

Based on the findings from the preceding sections, the following recommendations and options for action are made.



EDUCATION SECTOR



Findings

The education sector, especially the private institutions, were severely affected by the COVID-19 pandemic. The lockdown led to the closure of all educational institutions. It disrupted the academic calendar. There was a loss of teaching and learning time. Many teachers and support in private institutions were either furloughed or retrenched. Private institutions effectively lose the only source of revenue – student fees. Some private institutions closed permanently.

The education sector appeared ill-prepared for the crisis and ensuing lockdown. Most teachers and lecturers were not equipped to provide online learning to students. The challenges included the lack of interconnectivity, data, hardware and software and pedagogic skills to deliver lessons through the online medium. There was a lack of training for teachers on health and safety protocols. Teachers were also not given training to enable them to cope during and after the pandemic. Some 15% of the individuals surveyed in the education sector do not feel well informed about how to protect themselves or their fellow workers from COVID-19 whilst at work. They should therefore be provided with information about working during the crisis, which up to 31% of them have not received. Specifically, provide workers in this sector with health and safety training connected with the crisis, since only 30% of the individuals in the sector have undertaken health and safety training connected with the crisis.

Students faced similar challenges which included the lack of interconnectivity, data, hardware and software and digital skills to learn through online platforms. Schools also lack a digital infrastructure to make online learning available.



Recommendations

The following actions are recommended:

- ▶ Train teachers and lecturers to use digital communication technologies such as Zoom, MS Teams, Skype, WhatsApp, and Google Meet.
- ▶ Provide basic computer literacy training for teachers to maintain internet connections, use a computer, and surf the web for teaching resources.
- ▶ In-service training for existing teachers and pre-service training for student teachers should be given on delivering teaching using online applications, such as word processing, spreadsheets, database management, and e-presentation skills, internet navigation, and email management skills.



MANUFACTURING SECTOR



Findings

The manufacturing sector was severely affected by the pandemic and lockdown. Manufacturing activity slowed down due to a lack of imported raw materials, a decline in exports, closure of the borders, and low demand locally and abroad. Many workers lost their jobs. Some small and medium-sized companies that lacked a cash flow closed. The most vulnerable that lost jobs were casual, temporary, and low-skilled workers.

Although manufacturing establishments applied health and safety protocols to minimise the spread of the virus, many SMEs were ill-prepared to migrate to e-commerce. There was insufficient training given to workers to prepare them for work during and after the crisis. While office staff were able to work remotely, it was not possible for blue-collar workers on the manufacturing line.

For instance, 60% of the establishment have found it difficult to provide training to staff and 54% of the establishments had not given training to their employees to deal with new working arrangements.



Recommendations

The following actions are recommended:

- ▶ Train office staff to use digital communication technologies such as Zoom, MS Teams, Skype, WhatsApp, and Google Meet.
- ▶ Train blue-collar workers in job-specific technical skills and multiskilling.
- ▶ Train manufacturing employees at various occupational levels in communication, time management, marketing, sales, customer relations, problem-solving, listening, critical thinking, and collaboration.
- ▶ Invest in innovation, localisation, and local beneficiation, complemented by skills training at all occupational levels.
- ▶ Develop workers to produce personal protective equipment (PPE), including surgical masks, sanitisers, and disinfectants.
- ▶ Provide retrenched workers with entrepreneurship training.
- ▶ Devise and implement a skills plan for the manufacturing sector.



ACCOMMODATION AND FOOD SERVICE SECTOR



Findings

The accommodation and food services sector was affected by the pandemic and lockdown. The tourism and hospitality sector came to a virtual standstill which had a knock-on effect on the hotels, bed and breakfasts, lodges, and caterers. Most establishments temporarily or permanently closed due to a lack of customers and high operating costs.



Recommendations

The following actions are recommended:

- ▶ Train office staff to use digital communication technologies such as Zoom, MS Teams, Skype, WhatsApp, and Google Meet.
- ▶ Train administration and management staff to use e-commerce (e-tourism) applications to support the recovery of the sector.
- ▶ Train employees at various occupational levels in customer service, communication, time management, digital marketing and advertising, sales, supervision, problem-solving, listening, negotiation, and international business.
- ▶ Invest in innovation, inbound tourism, and domestic tourism, complemented by skills training at all occupational levels.
- ▶ Expand training in occupational health and safety.
- ▶ Provide retrenched workers with training in entrepreneurship and tour guiding.
- ▶ Devise and implement a skills plan for the accommodation and food services sector.

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▶ ANNEXURE A: LIST OF INTERVIEWEES

NO	NAME	DEPARTMENT/DESIGNATION
1	Mr Mulati	TIVET Ministry/ Director
2	Damaris Muhika	COTU / Trade Unionist
3	Dr Wanjiru Kariuki	Department of Post-Training Skills Development/ Education Secretary
4	Hellen Apiyo	Deputy Labour Commissioner/ Ministry of Labour and Social Protection
5	Stephen Obiro	Chief Manager Advocacy Communication & Policy/ FKE
6	Aggrey Chemonges	CEC for Tourism (Trans Nzoia County)
7	Diego Wilson	Department of Health (Tharaka Nithi County)/ Chief of Staff
8	Wanaina Muriuri	Deputy Director of Youth Affairs (Nairobi County)
9	Barrack Owange	Ministry of Labour and Social Protection/ Senior Labour Inspector
10	Joan Kephers Awiti	Kenya Private Schools Association/ Proprietor Golden Elites Academy
11	Robinson Anyal	Chairman of Western Kenya Hospitality Leaders Association and Committee member of Tourism Regulatory Authority

