

SIFA
Skills Initiative
for Africa

TC
Technical Cooperation

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



NAMIBIA



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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 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).

SIFA wishes to thank consulting Company Survey Warehouse, led by Mr. Christie Keulder who conducted this assessment. And to acknowledge and thank all the people who made invaluable contributions to the rapid assessment process.

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The Namibia rapid skills assessment report is a culmination of collective effort from the Survey Warehouse team, and the ILO technical backstopping team comprising of Terence Hogarth, Gideon Arulmani, Olga Strieska-Ilina, Cornelius Gregg, Bolormaa Tumurchudur-Klok and Naomy Kanyemba Lintini was instrumental in the successful finalization and production of this report.

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.

For Namibia, many other Countries, the impact of the pandemic has gone beyond health implications, affecting key economic sectors, and resulting in loss of employment and many economic hardships. The economic effects of lockdowns imposed by the Country were immediate and devastating, particularly, for micro, small and medium-sized businesses and for the tourism sector whose operations came to a start still because of the suspension of air travel.

In this regard, the pandemic exacerbated an already existing unemployment challenge, and the youth unemployment challenge in particular. The development challenges facing women was also brought to the fore as they were among those most adversely affected by the socio-economic impact of the pandemic.

Against this background, the ILO developed a Guidance Note to assist Countries to rapidly assess the reskilling and upskilling needs arising from the impact of the COVID-19 pandemic on their labour markets. The rapid assessment methodology was

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then applied in Namibia under the Skills Initiative for Africa (SIFA), a Programme of the African Union Commission and the African Union Development Agency (AUDA-NEPAD), which is financed by the European Union and German Government, and whose implementation is led by the German Development Agency (GIZ).

This report presents the findings of the rapid assessment, which, was conducted in the agriculture, blue economy, and tourism sectors. The report provides practical and actionable recommendations that can assist the Country to limit the career scarring effects of the pandemic on workers through among other things, provision of skilling and reskilling supports. The report also provides skills related actionable recommendations for the economic recovery of the companies in the assessed sectors.

The report is concise, with a clear analysis, and with concrete recommendations for rapid implementation. The recommendations encourages implementation of interventions that make a difference at a minimal cost.

The ILO and AUDA-NEPAD remain committed to supporting the Namibian 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

AU	African Union
BCLME	Benguela Current Large Marine Ecosystem
BoN	Bank of Namibia
CBNRM	Community-Based Natural Resource Management
DBN	Development Bank of Namibia
EIF	Namibia Environmental Investment Fund
EIG	Emergency Income Grant
FAO	Food and Agriculture Organisation
GDP	Gross domestic product
HAN	Hospitality Association of Namibia
HIF	Health Industry Forum
IATA	International Air Transport Association
ICU	Intensive care unit
IUCN	International Union for Conservation of Nature
LARRI	Labour Resource and Research Institute
MANWU	Metal and Allied Namibia Workers Union
MICT	Ministry of Information, Communication Technology
MoHSS	Ministry of Health and Social Services
MPC	Monetary Policy Committee
MSME's	Micro, small and medium enterprise
NAB	Namibia Agronomic Board
NANLO	Namibia National Labour Organisation
NAPHA	Namibian Professional Hunters Association
NDP5	5th National Development Plan
NEEEB	New Equitable Economic Empowerment Bill
NEF	Namibian Employers Federation

NIPA	Namibia Investment Promotion Act
NISO	Namibia Informal Sector Organisation
NLFS	Namibia Labour Force Survey
NPLs	Non-performing Loans
NSA	Namibia Statistics Agency
NTA	Namibia Training Authority
NTB	Namibia Tourism Board
NUST	Namibia University of Science and Technology
NWR	Namibia Wildlife Resorts
PPE	Personal protective equipment
SME	Small and medium enterprise
SSC	Social Security Commission
TUCNA	Trade Union Congress of Namibia
TVET	Technical and vocational education and training
UN	United Nations
UNWTO	The World Tourism Organisation
VAT	Value-added tax
WTTC	Work Travel and Tourism Council
y/y	Year-on-Year

1. Introduction

The **objective of this assignment** was to conduct a rapid assessment of targeted sectors with a view to identifying the skills and labour shortages and surpluses resulting from the impact of the COVID-19 pandemic in Namibia and to recommend effective reskilling and upskilling measures that contribute to economic recovery and effective reintegration of the affected segments of the labour force into employment.

The rapid assessment aims to identify specific reskilling and upskilling needs in selected economic sectors and to signal:

1. Occupations where workers are at risk of losing jobs;
2. Entry points and opportunities in sectors where there is a sudden change in demand for skills due to new ways of work or new products and services which had to be offered, or in sectors experiencing spikes in labour demand due to the COVID-19 situation.

The analysis of the findings of the rapid assessment will highlight labour market challenges arising from the effects of COVID-19 on selected economic sectors in Namibia. The rapid assessment was conducted to support Namibia to identify, among others:

- **Skills and labour shortages in the sectors (industries and services) where demand has spiked** due to the pandemic and the lockdown situation (such as healthcare workers, delivery services, manufacture of related pandemic mitigation tools, equipment and health gadgets);
- **Skills and labour shortages in priority sectors (such as seasonal agriculture, tourism) where labour supply has been cut off** and has put the sustainability of businesses and related vital products at stake;
- **Critical employability skills applicable to the affected sectors** including foundation skills, core skills, digital skills, green skills, business management and entrepreneurship skills, and transferrable technical skills.



2. Background

“The COVID-19 pandemic is not only a public health crisis but also a major economic crisis with massive labor 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 per cent 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 a number of 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 and 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, in particular, with higher levels of informality and weak social protection systems, faces major health and economic challenges. Key sectors that have been affected include retail trade, tourism (including hotels and restaurants), and manufacturing.”¹

In an effort to mitigate the negative impact of the pandemic especially on the labor market in Namibia, there is a possible need for effective reskilling and upskilling measures. It is imperative to develop an understanding of the existing and resulting skills needs and shortages.

This rapid assessment aims to identify arising skills needs as a result of the pandemic in Namibia, and to identify reskilling and upskilling needs with specific reference to tourism, agriculture and the Blue Economy (sustainable use of ocean resources for economic growth, improved livelihoods, and jobs while preserving the health of the ocean ecosystem).

¹ https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/briefingnote/wcms_738753.pdf



3. Methodology

Survey Warehouse held consultative discussions with the Namibian task team to confirm the sectors of the labour market in which analysis would be conducted. These sectors were identified as tourism, agriculture, and the blue economy. Furthermore, the task team provided Survey Warehouse with relevant databases for the survey for both the demand side (employers) and supply side (youth workers, informal economy workers, and others who have lost their employment during the pandemic).

The employer survey was distributed to Namibia Tourism Board (NTB) registered members, Namibian Employers Federation (NEF) members, and businesses registered with the Namibia Training Authority (NTA). Survey Warehouse conducted a previous study on the impact of COVID-19 on businesses in Namibia between May and July 2020. For the purposes of the rapid assessment, Survey Warehouse extracted responding businesses in the relevant sectors from the former survey's database. Table 1 shows the number of businesses to which the online employer survey link was disseminated.

Table 1: Dissemination of online employer survey link

Database		Number of employers
NTB registered members		3 648
NEF members		2
NTA database		
	Fishing and marine	94
	Hospitality and tourism	204
	Transport, logistics and warehousing	46
Survey Warehouse database		140
Total		4134

The NTA provided Survey Warehouse with a database of technical and vocational education and training (TVET) graduates. TVET comprises education and training which provides knowledge and skills for employment. Education and training methods involve formal, non-formal, and informal learning. Survey Warehouse disseminated the link to the online individual survey questionnaire to 970 TVET graduates who were indicated to be unemployed, self-employed or farmers – those deemed most vulnerable during the pandemic. Online self-administered surveys were hosted on the ILO website. For both the employer and

individual surveys, Survey Warehouse sent reminder emails on a bi-weekly basis, encouraging invitees who had not responded or who had responded partially to complete the online surveys. Where invitees requested telephone interviews, Survey Warehouse call centre agents conducted interviews telephonically. This method was specifically used for the survey of individuals.

The online surveys were hosted from 8 January to 31 March 2021. Response rates to each of the surveys are shown in Table 2.

Table 2: Online survey response rates

Survey	Complete returns	Incomplete returns	Total
Individual	228	97	325
Employer	103	30	133

Tables 3 and 4 provide a detailed sample breakdown for the individual and employer surveys.

Table 3: Sample breakdown of individual skills needs assessment data

Gender	
Male	59.4%
Female	40.6%

Current employment status	
In employment	19.4%
Self-employed	12.6%
A trainee or apprentice	2.5%
Working in family business but unpaid	2.8%
Not in employment but looking for work	62.8%

Age	
18-20	0.4%
21-25	6.3%
26-35	85.4%
36-45	7.5%
46-55	0.4%

Highest level of education completed	
Secondary education	1.7%
Community college/ Intermediate diploma / Vocational training after secondary	93.7%
Bachelor's degree	3.3%
Post-graduate (master's / doctorate)	0.8%
Don't know	0.4%

Table 4: Sample breakdown of enterprise skills needs assessment data

Type of business	
Private company	87.2%
Co-operative	2.3%
Not for profit organisation	1.5%
National or local government organisation	9.0%

Main business of establishment	
Agriculture, forestry and fishing	5.3%
Manufacturing	0.8%
Construction	2.3%
Wholesale and retail trade including repairs of motor vehicles and motorcycles	3.1%
Transportation and storage	3.8%
Accommodation and food service activities	73.3%
Financial and insurance activities	3.8%
Real estate activities	0.8%
Professional, scientific and technical activities	2.3%
Administrative and support service activities	2.3%
Education	1.5%
Human health and social work activities	0.8%

Number of employees in 2021 (current)	
Less than 10	41.6%
10-24	28.8%
25-99	17.6%
100-249	4.0%
250-499	3.2%
500 or more	4.8%

With the aim to report on as many cases as possible, Survey Warehouse retained the partially completed cases for both the individual and employer surveys, as partially completed cases still contained responses to important questions of the survey. For ease of interpretation, *n* denotes the number of respondents who answered each of the questions presented as figures in this report, and thereby qualifying the number of responses on which the analysis for the specific question was conducted.

It should however be noted that as a result of demographic questions to the individual survey posed at the end of the questionnaire, in many instances specific questions cannot be cross-tabulated by personal characteristics of the individual participants. With many missing values in the demographic section, cross-tabulations do not relate back to the analysis conducted on the overall sample in a clear way.

Furthermore, Survey Warehouse endeavored to conduct key informant interviews (KIIs) with key informants, among which included:

- Training providers and designers of formal and informal vocational and technical education;
- Key government officials;
- Private and public employment service organisations;
- Business associations; and
- Worker representatives.

A total of 19 key informants were interviewed. Responding informants are listed in Annex 1 of this report. Just about all KIIs were conducted via digital platforms (e.g. Microsoft Teams, Zoom or WhatsApp call), apart from four of the interviews that were conducted using face-to-face interviews.

Country level related studies were reviewed, and analysis was conducted triangulating the data obtained for the Namibian studies. Data for the online surveys were downloaded to SPSS². Analysis was done using common frequencies, multiple response analysis and cross-tabulations. KIIs were digitally recorded and transcribed in Microsoft Word. Transcriptions were analyzed thematically, and common themes were integrated into the quantitative findings, and specifically in the section on conclusions and recommendations.

The analysis will provide recommendations on:

1. Required training measures in the context of other response measures implemented by the country.
2. How a global crisis like the COVID-19 pandemic can facilitate the change needed to operate under the “new normal” and how labour market actors should shift focus from crisis management to assimilating change and adapting to the normal.
3. Which labour market systems and structures need to be overhauled so that they are more fit for purpose in light of the new realities.

² Statistical Package for Social Sciences

4. Contextual factors

By the time COVID-19 hit Namibia and the first lockdown was enforced on 27 March 2020, the country's economy had witnessed four years of meagre or negative growth. Government embarked on a fiscal consolidation policy in 2016 to contain its growing debt and put the country back on the path of macroeconomic stability. However, the drastic expenditure cuts had a massive dampening effect on the economy as government spending was one of the main drivers of the economy.

4.1 The Namibian economy prior to the COVID-19 pandemic

According to the Namibia Statistics Agency (NSA), the country's real gross domestic product (GDP) grew by 4.3% year-on-year in 2015. In 2016, annual growth was 0%, followed by -1.0% in 2017, 1.1% in 2018, and -0.6% in 2019.³

Some of the pillars of the economy, such as construction and wholesale and retail trade, staggered as government's spending stimulus faded. Construction's annual growth in real terms plummeted from 22.7% in 2015 to -41.1% in 2016.⁴

Retrenchments⁵ and diminishing consumer spending power led to wholesale and retail trade growing by only 3% in 2016, compared to 7% in 2015. This sector has been in recession since 2017.⁶

According to the NSA's latest Labour Force Survey, Namibia's unemployment rate in 2018 was 33.4%, compared to 27.9% in 2014. The youth unemployment rate in 2018 was 46.1%, compared to 39% in 2014.⁷

4.2 The economic impact of the COVID-19 pandemic

As can be seen from the section above, the Namibian economy was already in recession by the time the COVID-19 pandemic reached its shores. Three days after the first two cases tested positive, the president proclaimed a national state of emergency, and on 27 March 2020,⁷ the country's two largest economic regions, Khomas and Erongo, went into lockdown. Additionally, government adopted containment measures, such as social distancing, work-from-home initiatives (including suspension of the parliament for 21 days), and closures of all points of entry and comprehensive restrictions on cross-border travel. The domestic travel lockdown was relaxed on 4 May 2020 but

points of entry remained closed, except for the transportation of goods. The authorities further eased restrictions on travel by removing the obligation to quarantine for tourists with a negative COVID-19 test result.⁹

The economic effects were immediate and devastating, especially for micro, small and medium enterprises (MSMEs) whose operations were deemed 'non-essential', and the entire tourism sector came to a halt with the suspension of air travel globally and hard lockdowns of international borders.

³ https://d3rp5jat0m3eyn.cloudfront.net/cms/assets/documents/Annual_National_Accounts_2019.pdf

⁴ https://d3rp5jat0m3eyn.cloudfront.net/cms/assets/documents/Annual_National_Accounts_2019.pdf

⁵ Retrenchment is a form of dismissal due to no fault of the employee, it is a process whereby the employer reviews its business needs in order to increase profits or limit losses, which leads to reducing its employees.

⁶ Accessed at https://d3rp5jat0m3eyn.cloudfront.net/cms/assets/documents/Annual_National_Accounts_2019.pdf.

⁷ Accessed at https://d3rp5jat0m3eyn.cloudfront.net/cms/assets/documents/Labour_Force_Survey_final_-_2018.pdf.

⁸ <https://www.afro.who.int/sites/default/files/2020-04/sitrep%209.pdf>.

⁹ <https://www.info-namibia.com/covid-19>.

4.2.1 Government stimulus

Finance Minister ipumbu Shiimi on 1 April 2020 announced a stimulus and relief package amounting to N\$8.1 billion.¹⁰ The package included, among others, N\$400 million for wage subsidies for sectors hit the hardest by the impact of the COVID-19 pandemic, about N\$3 billion for the accelerated repayment of overdue and undisputed value-added tax (VAT) refunds and N\$800 million for the

accelerated payment of overdue and undisputed invoices for goods and services provided to government. N\$562 million was made available for an emergency income grant (EIG), a once-off payment of N\$750 to Namibian citizens between 18 and 60 years who lost their jobs, either in the informal or formal sector.

Additional measures included:

- A tax-back loan scheme for tax registered and tax paying employees and self-employed individuals who lost income or part thereof or who experienced difficulties due to the COVID-19 outbreak
- A non-agricultural small business loan scheme
- An agricultural business loan scheme
- Granting of policy relief to borrowers by the Development Bank of Namibia (DBN) and AgriBank in the form of a capital repayment moratorium
- A tax-back loan scheme for non-mining corporates
- Relaxing labour regulations to protect jobs
- Water subsidy during lockdowns

In his Budget Speech 2020/21 delivered on 17 March 2021, Finance Minister ipumbu Shiimi said the stimulus and relief package scaled up to N\$9.1 billion, comprising of N\$6.7 billion total budgetary allocation and N\$2.4 billion government guarantee-backed loans.¹¹ The following is a breakdown of some of the key expenditures:

- Procurement of medical equipment and supplies, intensive care unit (ICU) beds, personal protective equipment (PPE), isolation facilities, and related supplies at a cost of N\$727.7 million
- N\$576 million spent on the EIG
- N\$27.9 million and N\$78.8 million respectively spent on the wage subsidy and employee salary protection programme
- N\$468 million for improved sanitation and health at government schools and hostels countrywide
- N\$72 million for water supply in urban and rural areas during lockdown restrictions
- N\$22 million was utilised by the security sector to procure COVID-19 related medical supplies, refurbishment of related infrastructure, and enforcement of regulations
- N\$450 million guaranteed loans by the DBN
- N\$174 million new loans and restructured arrear payments at Agribank.

¹⁰ For the full details of his announcement see: <https://mof.gov.na/documents/35641/36580/Phase+1+VF+Stimulus+and+Relief+Package%2C+Republic+of+Namibia.pdf/9a2314de-4b39-00a1-b8bd-4ffcfe1f20d3>.

¹¹ Accessed at https://mof.gov.na/documents/35641/36583/Budget+Statement+2021_22.pdf/356d55a3-c7d5-fef1-941c-528b1baa787e.

4.2.2 The COVID-19 Communication Centre

The COVID-19 Communication Centre provided a platform for all sectors to engage the public on key issues affecting their respective sector in relation to the COVID-19 lockdown guidelines. The Centre was interactive, with journalists given an opportunity to ask questions during the daily live press conferences as well as through a dedicated email address.

The Centre was jointly launched on 2 April 2020¹² by the Minister of Health and Social Services (MoHSS), Dr Kalumbi Shangula and the Minister of Information, Communication Technology, Dr Peya Mushelenga. Government hosted two daily press conferences, with the morning briefing addressing issues of non-health sectors, while the afternoon briefing was dedicated to the health sector response.

4.2.3 Bank of Namibia's policy responses

The Monetary Policy Committee (MPC) of the Bank of Namibia (BoN) had already reduced the repo rate by a total of 25 basis points in February 2020 for normal economic reasons, but it cut it stepwise by a further 250 basis points in the months following the onset of the pandemic, reaching a historical low of 3.75% in August 2020.

The BoN further implemented a set of macroprudential policy measures to provide relief to individuals, small and medium enterprises (SMEs) and corporations, and to the banking system in general. These policy measures included loan repayment moratoriums, liquidity relief measures, relaxation of the capital conservation buffer, and concentration risk/single borrower limit relief.

Namibia mobilised leadership through the presidency to support the COVID-19 response plan. A multi-sectoral national coordination mechanism was established, which, at the time, extended to include senior leadership of all government ministries under the leadership of the Secretary to Cabinet. Generally, the National Health Emergency Coordination Committee was chaired by the Incident Manager of the MOHSS.

Most businesses in the survey sample rely on the government as the main source of information about the pandemic.

In its Financial Stability Report April 2021,¹³ the BoN states that out of a total of 14 806 applications received by the commercial banks for the year 2020, 14 148 applications were approved, representing a 95% of application approval rate. The biggest share of the loans approved under the relief measures were for individuals, comprising 44% of the applications.

The total value of repayment holidays amounted to N\$10.3 billion, of which 46% were granted for the period of 1-3 months, 18.9% for 4-6 months, and 4% for 7-12 months.

¹² <https://www.nbc.na/news/covid-19-communication-centre-launched.29778>.

¹³ Accessed at <https://www.bon.com.na/CMSTemplates/Bon/Files/bon.com.na/48/481eb019-b29e-4dec-80e7-671062329ebe.pdf>.

4.2.4 Economic performance

The Preliminary Annual Accounts released by the NSA¹⁴ showed the overall economy contracted by 8% in real terms in 2020, the biggest annual contraction in Namibia's history.

In nominal terms, Namibia's GDP in 2020 amounted to about N\$176.3 billion, compared to nearly N\$181.6 billion in 2019, and in real terms, primary industries contracted by 6.1% year-on-year in 2020, compared to -6.9% in 2019. An annual contraction of 14.4% was recorded by secondary industries (compared to 1.7% in 2019), while tertiary industries contracted by 5.6% year-on-year (compared to 1.2% in 2019).

4.2.5 Health response

The government has paid US\$1 626 240 to acquire vaccine doses (enough to vaccinate 20% of the population through the COVAX Facility) and signed a Financial Commitment Agreement for the remaining US\$9 096 780. Namibia started its vaccination

Key sectors reported annual growth of:

- **Mining and quarrying:** -14.9% (2019: -9.5%)
- **Manufacturing:** -19.6% (2019: 4.3%)
- **Construction:** -11.8% (2019: -5.5%)
- **Wholesale and retail trade:** -11.7% (2019: -7.8%)
- **Hotels and restaurants** (a proxy for tourism): -33.1% (2019: 2.8%)
- **Transport:** -26.3% (2019: -3.4%)
- **Financial and insurance services:** -11.7% (2019: 12.4%)
- **Private households with employed persons:** -7.6% (2019: -2.5%)

campaign on 23 March 2021 after receiving donations of the Sinopharm vaccine from China (100 000 doses) and the Covishield/Astrazeneca vaccine (30 000 doses) from India.

4.3 COVID-19 and employment

Namibia's last official Labour Force Survey was conducted in 2018. Accurate employment statistics are thus not available and where they exist are often hard to access. This led the BoN to conclude that due to the lack of timely statistics, assessing the pandemic's impact on employment, especially in the informal market, is "quite difficult".¹⁵

According to Labor Minister Utoni Nujoma, the pandemic caused 11 210 job losses from 983 employers in 2020/21 and in its Annual Report of 2020, the BoN estimated that about 30% of employment in the formal tourism sector was lost. This means 7 830 people lost their jobs in this sector. The bank also acknowledged that the loss of jobs in the sector is likely to be much worse should data on loss of informal jobs be available.

The full impact will depend on how long the COVID-19 pandemic persists. In the absence of reliable and recent unemployment statistics, and years of negative or poor economic growth, exacerbated by the impact of the COVID-19 pandemic, current unemployment could well be 40% of the overall workforce (up from 33.4% in 2018). This means that approximately 1.8 million Namibians would be affected by an unemployment rate of 40%.¹⁶

This amounts to about 70 000 more than in 2018 when the NSA conducted its last Labour Force Survey. The average household in Namibia consists of four people, suggesting that about 1.8 million people could be affected by an unemployment rate of 40%.

¹⁴ Accessed at https://d3rp5jat0m3eyn.cloudfront.net/cms/assets/documents/PRELIMINARY_NATIONAL_ACCOUNTS_20201.pdf.

¹⁵ Accessed at <https://www.bon.com.na/CMS/Template/Bon/Files/bon.com.na/79/7923760d-1805-4265-906a-b424abafdef8.pdf>.

¹⁶ <https://www.republikein.com.na/nuus/jobs-massacre-witnessed-in-20202021-02-17>.

According to the Namibia Labour Force Survey 2018 Report (NLFS 2018) of the Namibia Statistics Agency (NSA) Namibia's economically active population was 1,090,153.¹⁷ At an estimated broad unemployment rate of 40%, 436,061 people could be jobless.

According to the NSA's 2015/16 Namibia Household Income and Expenditure Survey the average household size in Namibia was 4.2 people.¹⁸

4.4 Household and corporate debt

According to the BoN's Financial Stability Report April 2021¹⁹, average annual disposable income in 2020 amounted to N\$75 725 – 1.7% less than in 2019. Adjusted credit to disposable income in 2020 was 89.1% compared to 83.8% the previous year.

Household indebtedness grew by 4.5% y/y in 2020 and household disposable income contracted with 1.7% during the same period. The drop in disposable household income is a direct result of the rising unemployment and decline in compensation due to the ongoing recession and the impact of the COVID-19 pandemic.

According to the BoN's monthly Monetary and Financial Statistics Report²⁰, business debt at the end of 2020 totaled N\$44.3 billion, compared to N\$44.85 billion at the end of 2019. Y/y, mortgage loans contracted by 8.7%, while other loans and advances rose by 0.1% and overdrafts by 12.6%.

According to the BoN's Financial Stability Report April 2021²¹, the asset quality of commercial banks deteriorated last year and a "persistent increase" in non-performing loans (NPLs) was witnessed. The banking sector's NPL ratio rose above the new trigger ratio of 6.0% for times of crisis and reached 6.4% in 2020, a "significant escalation" from 4.8% of 2019. The Bank attributed this spike to the "unfavorable economic conditions, cash flow constraints experienced by both households and businesses and the downside risk emanating from the COVID-19 pandemic, which caused business to either scale down operations or close". This means that the current economic conditions will play an important part in businesses' and households' capacity to service their debt as is evident in the sharp increase in write-offs. In 2020 commercial banks wrote off 11,09% of their profits compared to only 2.47% in 2019.



¹⁷ https://d3rp5jatom3eyn.cloudfront.net/cms/assets/documents/Labour_Force_Survey_final_-_2018.pdf

¹⁸ https://d3rp5jatom3eyn.cloudfront.net/cms/assets/documents/NHIES_2015-16.pdf

¹⁹ Accessed at <https://www.bon.com.na/CMSTemplates/Bon/Files/bon.com.na/48/481eb019-b29e-4dec-80e7-671062329ebe.pdf>.

²⁰ Accessed at <https://www.bon.com.na/Economic-information/Statistical-information/Monetary-and-fincancial-statistics/All-Monthly-Selected-Statistics.aspx>.

²¹ <https://www.bon.com.na/CMSTemplates/Bon/Files/bon.com.na/48/481eb019-b29e-4dec-80e7-671062329ebe.pdf>.

5. Three key sectors

5.1 Tourism

The tourism and travel standstill brought on by the pandemic kept an estimated 900 million international tourists at home in 2020's first ten months, compared to the same period in 2019²². The World Tourism Organization (UNWTO) furthermore estimated that the unprecedented health crisis translated into a loss of US\$935 billion in export revenues, more than 10 times the loss in 2009 under the impact of the global economic crisis. Tourism numbers retreated to levels last seen 30 years ago²³.

The tourism standstill put millions of jobs at risk globally. In September, the World Travel and Tourism Council (WTTTC) predicted that more than 121 million jobs were at risk, or would be impacted in some way, by the health crisis, with an estimated loss of US\$3.4 trillion in global GDP²⁴. In 2020 it was estimated that at the peak of the pandemic,

one million travel and tourism related jobs were lost daily. Informal and part-time workers in the industry were hardest hit, with no social or formal job protections in place, especially in places like Namibia or developing countries. In 2019, it was one of the fastest growing sectors accounting for one in four new jobs created worldwide over five years consecutively.

The International Air Transport Association (IATA) estimated that global arrivals will not recover to pre-COVID levels before 2024.²⁵ Alternative outlooks are more positive, with the UNWTO Panel experts expecting international tourism to improve by the third quarter of 2021.^{26,27}

5.1.1 COVID-19 and local tourism

In early 2021, shortly after the COVID-19 pandemic swept across Europe and the rest of the globe, Namibia's billion-dollar tourism industry collapsed. The abrupt decimation of this thriving sector continues to date, as COVID-19 spikes continue despite vaccination campaigns, strict health and safety measures and border closures. The pandemic was devastating to an industry that attracted more than 1.6 million visitors in 2019.²⁸

Namibia's Tourism Revival Initiative, announced in August 2020, and implemented on 1 September marked the reopening of Namibia's borders to tourists. This paved the way for a trickle of foreign tourists to visit the country, including from major

markets such as Germany. Current arrival rates are far from the pre-pandemic arrival rates and Namibia remains on the warning list in Germany²⁹ and the United States of America³⁰ as a risk country to which all travel except essential should be avoided. Current arrival protocols are simple, only requiring incoming guests to present a negative COVID-19 test not older than seven days³¹.

In February 2021, the BoN announced the country's tourism industry lost about N\$3.2 billion from travel-related services because of COVID-19. BoN governor Johannes Gawaxab said pre-COVID-19, Namibia received over 40,000 tourists a month but between September and December last year, the

²² Accessed at <https://www.unwto.org/covid-19-and-tourism-2020>.

²³ Accessed at <https://www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-international-tourism>.

²⁴ Accessed at <https://wtcc.org/Research/To-Recovery-Beyond>.

²⁵ <https://www.businesstraveller.com/business-travel/2020/07/28/air-travel-will-not-recover-until-2024-iata/>.

²⁶ Accessed at https://unctad.org/system/files/official-document/ditcinf2020d3_en.pdf.

²⁷ <https://www.unwto.org/node/11557>.

²⁸ https://www.met.gov.na/files/downloads/a30_TOURIST%20STATISTICAL%20REPORT%202019.pdf.

²⁹ https://www.auswaertiges-amt.de/de/aussenpolitik/laender/namibia-node/namibiasicherheit/208314#content_0.

³⁰ <https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories/namibia-travel-advisory.html>.

³¹ Accessed at <https://www.namibiansun.com/news/signs-of-tourism-recovery2021-04-20>.

country only received 6,700 tourists.³² Overall, the BoN warned as long as the COVID-19 pandemic remains a health risk, “we are not expecting fast recoveries in sectors that depend on travelling.”

In April 2021, the Hospitality Association of Namibia (HAN) announced that in the first quarter of 2021, occupancy rates stood at less than 20%. HAN indicated that 18% of those visitors arrived from Europe, from key markets such as Germany, Austria, and Switzerland³³.

Women, who make up most workers in the tourism industry, were some of the most impacted.

The Namibia Labour Force Survey (NLFS) report of 2018 showed that between 2016 and 2018, the number of women working in the food and accommodation sector increased by 74%, underlining the sector as an important job creator for women. Of the total of 83 056 persons working in the food and accommodation sectors in 2018, 63 900 were women.³⁴

5.1.2 Tourism and conservation

Over the past three decades Namibia’s community conservation model has attracted widespread international recognition and helped empower rural communities who benefit from the protection of wildlife and natural resources through sustainable tourism and hunting operations. The Community-Based Natural Resource Management (CBNRM) grew out of the recognition that wildlife and other natural resources are of value in communal areas, and that these resources can be unlocked if local communities are empowered to manage and utilize resources themselves. Tourism has played a key role in the success of the model.^{36,37}

Conservancies supported profitable joint-venture tourism and hunting operations, which in turn helped boost employment, community

Many businesses were forced to retrench employees, cut salaries, or close their doors. Individuals who worked closely with the sector as guides, drivers, or those making and selling crafts and arts, lost their freelance income streams.³⁵

Yet, the shake-up of the industry, though harsh, presents a chance to reshape the industry. Much needed attention can be paid to refining and redefining the industry, to update technology and focus on domestic and regional travelers, a long neglected and more price-sensitive market segment.

Meanwhile, local travelers have jumped on the opportunity for cheaper travel in Namibia, as the industry began to focus on attracting domestic visitors, dropping prices in their quest for survival. According to HAN, pre-COVID, Namibian guests represented around 32% of total occupancy rates, a number that has steeply risen to around 67% in 2020/21.

development and wildlife conservation. Namibia’s well-regulated hunting sector attracted big and small game hunters and generated funding for the protection of wildlife, including the vulnerable black rhino population³⁸.

Conservancies are self-governing, democratic entities, run by their members, with fixed boundaries that are agreed with adjacent conservancies, communities, or landowners. The emphasis is on sustainability, with communal conservancy members benefitting from adapting to living close to wildlife which can otherwise lead to conflict as they pose a danger to lives, livestock, infrastructure, and crops.³⁹

³² Accessed at <https://africa.cgtn.com/2021/02/17/namibias-tourism-industry-loses-220-million-due-to-covid-19-pandemic/>.

³³ Accessed at <https://www.namibiansun.com/news/signs-of-tourism-recovery2021-04-20>.

³⁴ Accessed at https://d3rp5jat0m3eyn.cloudfront.net/cms/assets/documents/Labour_Force_Survey_final_-_2018.pdf.

³⁵ <http://conservationnamibia.com/blog/b2021-omba-arts.php?fbclid=IwAR3jhGLlesHMdu0u6NYoLVTNqUwjs-X0lv9Y2opSLdW76n4Auk5RrPavkBU>.

³⁶ <http://www.nacso.org.na/resources/state-of-community-conservation>.

³⁷ <https://communityconservationnamibia.com>.

³⁸ <https://www.met.gov.na/services/conservancies/193/>.

³⁹ <http://conservationnamibia.com/factsheets/communal-conservancies.php>

Today, nearly half of Namibia's land is set aside for some type of conservation management, with 20% of that land comprising 86 communal conservancies that are home to nearly 230 000 people and that provide over 5 000 direct jobs⁴⁰. There is approximately 180 083 km² under conservancy

management in Namibia.⁴¹ The conservancy model is furthermore credited with the reduction in poaching and the protection of vulnerable wildlife, including the spurt of growth in Namibia's elephant population.⁴²

5.1.3 COVID-19 and conservation

The symbiotic relationship between communities, tourism and conservation was plunged into crisis with the onset of COVID-19. Although the tourism market was affected, communities living in conservancies that were heavily reliant on tourism⁴³ through lodges, guiding, souvenir sales and other services, were some of the worst affected.⁴⁴

Also, the steep decline in tourism numbers impacted conservation funding. Conservationists reported in mid-2020 that essential park anti-poaching services in national parks and other wildlife reserves were at risk due to the cessation of much of the tourism and hunting income that funds them. "Photographic and hunting clients are the main source of income for our national parks, conservancies, and private game ranches."⁴⁵

Concerns were raised that poaching of rhino, elephant and other vulnerable wildlife species were at risk of increasing. Moreover, international funding was halted in some cases, increasing pressure on conservation efforts.⁴⁶

A 2020 joint survey by the University of Namibia and Bath Spa University in five communal conservancies to understand the initial impact of COVID-19 on community-based conservation in Namibia was conducted. Most reported major funding disruptions that put on hold crucial development projects in their areas. Water and

electrification projects were halted, the budgets dependent on hunting guests. In another case, plans to start a community vegetable garden and hand out seeds folded.⁴⁷

Some of these communities had already gone through a devastating drought that led to smaller wildlife numbers and less trophy hunting opportunities and the research furthermore discovered that four of the five conservancies in the sample lost donor funding from major international institutions.

In March 2021, a special issue of PARKS, the journal of the International Union for Conservation of Nature (IUCN) World Commission on Protected Areas, noted that the initial estimates suggest Namibia's communal conservancies could lose millions in direct tourism revenues, threatening funding for 700 game guards and 300 conservancy management employees.⁴⁸ The pandemic also threatened the viability of dozens of joint venture operations, employing another 1,400 community members.

More than half of protected areas in Africa reported that they were forced to halt or reduce field patrols and anti-poaching operations as well as conservation education and outreach. An estimated one in four rangers had experienced pay cuts or delayed salaries, and 20% lost their jobs. Without game guards to look after iconic wildlife, the fear is

⁴⁰ <https://www.namibiansun.com/news/new-project-to-support-communal-conservancies-2021-02-08>.

⁴¹ <http://www.nacso.org.na/sites/default/files/The%20State%20of%20Community%20Conservation%20Report%202019%20-%20book.pdf>.

⁴² It is estimated elephant numbers increased from around 7 500 in 1995 to around 24 000 in 2019. Namibia remains home to the world's largest population of free-roaming black rhinos (*Diceros bicornis*).

⁴³ <https://www.worldwildlife.org/magazine/issues/winter-2020/articles/namibia-s-conservancies-get-a-lifeline-for-people-and-wildlife>.

⁴⁴ <http://conservationnamibia.com/blog/b2021-omba-arts.php?fbclid=IwAR3jhGLlesHMdu0u6NYoLVTNgUwjs-X0lv9Y2opSLdW76n4Auk5RrPavkBU>.

⁴⁵ Gail Potgieter 2020, The Coronavirus and Namibian Conservation – How you can help. Namibian Chamber of Environment, June 2020. Accessed at: <http://conservationnamibia.com/blog/b2020-coronavirus-conservation.php>.

⁴⁶ <https://www.ccf-namibia.org/urgent-appeal-for-support-for-community-game-guards>.

⁴⁷ <http://www.nje.org.na/index.php/nje/article/view/volume4-lendelvo>.

⁴⁸ Accessed at: <https://parksjournal.com/parks-27-si-march-2021/>.

that prospects for poaching will increase. This fear is not unfounded as the first rhino poaching in a communal conservancy in over two years occurred in April 2020, possibly due to reduced tourism and/or conservation presence. Therefore, it remains to be seen whether the long-term, cumulative effects of the pandemic might lead to the collapse of Namibia's much-lauded communal conservancy program.

5.2 Agriculture

Agriculture in Namibia was not immune to the economic and social shocks emanating from the COVID-19 pandemic but was arguably spared the worst of the health crisis.

Despite COVID-19, the NSA reported that the agriculture and forestry industry recorded a reported improved growth of 47,2% during the second quarter of 2020, a feat attributed to bumper harvests following good rainfalls. This translated to a N\$2.4 billion contribution to the GDP. Meanwhile the crippling drought of the preceding years had depleted livestock numbers, with the livestock farming sector experiencing more than a 78% decline in real value added.⁵⁰

The pandemic broke out at a time that the sector had endured one of the worst droughts of the past 100 years, disrupting and in some cases, significantly damaging commercial farming operations as well

5.2.1 Different farming systems

Namibia's agricultural sector employs more than 167 000 people, making it the biggest employer in Namibia. It is estimated that more than 15% of Namibian employees work in the sector, and that around 70% of Namibians rely in one way or another on the sector for their livelihoods.⁵¹

Namibia's agricultural sector can be defined as being of a *"dualistic nature where a developed, technologically based and relatively productive*

*COVID-19 had unleashed "a perfect storm of increased numbers of people in conservancies, increased human suffering and increased pressure on wildlife. With few alternatives, communities face a precipitous slide into abject poverty; and the return of poaching, as a means of survival, looms in these once amazingly successful communal conservancies."*⁴⁹

as threatening food security for thousands of Namibians. Years of drought had forced livestock farmers to drastically cut the number of animals. They have only now begun the restocking phase, while still battling low cash reserves to do so.

The country's commercial farming sector was one of the least impacted by the pandemic. In fact, the relative seclusion of farmers, whether commercial or subsistence, provided a natural buffer from potential infections and growing agri-businesses such as charcoal could continue to be transported across borders.

It is not clear whether any jobs were lost in the agricultural sector, though between 2020 and to date, the sector has not announced any COVID-19 related retrenchments or pay cuts.

*commercial sector co-exists with a subsistence sector characterized by low productivity where manual labor and the use of traditional methods of production dominate."*⁵²

Namibia has four distinct farming systems that consists of small-scale mixed farming with crop and livestock production mostly for own consumption; cattle farming, on freehold or commercial land for production or own use; small stock farming; and

⁴⁹ Accessed at <https://www.ccf-namibia.org/urgent-appeal-for-support-for-community-game-guards>.

⁵⁰ See <https://www.namibian.com.na/205140/archive-read/Crop-farming-to-the-rescue-in-second-quarter>.

⁵¹ NSA, 2018, Namibia Labour Force Survey, accessed at https://d3rp5jat0m3eyn.cloudfront.net/cms/assets/documents/Labour_Force_Survey_final_-_2018.pdf.

⁵² Accessed quote at <https://www.nta.com.na/wp-content/uploads/2020/07/Sector-Skills-Plan-AGRICULTURAL-SECTOR-2013-2017.pdf>.

commercial crop production. An estimated 19.8% of Namibian households rely directly on small crops and livestock herds to put food on the table, while surpluses are sold for a small income.⁵³

The sector's contribution to the GDP fluctuated between 5.1% to 3.3% in the past decade. Overall, the sector contributed to 167 242 jobs in 2018, totaling 23% of total employment rates in Namibia. It is not only one of the most important sectors for employment, but one with enormous potential for future growth.⁵⁴

5.2.2 Food security

Being a dry and arid land with regular prolonged droughts means large portions of the Namibian population have to purchase their food and are reliant on commercial markets for their food security. Household income levels are thus closely tied to household food security and loss of household income could result in serious food gaps and acute malnutrition.

Following a prolonged drought, the COVID-19 pandemic further exposed Namibia's dire food insecurity. Between July 2020 and March 2021 around 428 000 Namibians or 17% of the

According to the NSA a total of 70 747 farmers are involved in mixed farming operations, consisting of subsistence and commercial activities; 29 320 farmers were growing crops such as legumes; 11 859 were cattle and buffalo farmers, 10 301 employees worked in the fishing and fish processing sub-sectors and an additional 45 015 were classified as "other" agricultural workers.⁵⁵

population, were classified as facing "high levels of acute food insecurity (IPC Phase 3) or worse, including around 14 000 people in Emergency (IPC Phase 4). This population requires urgent humanitarian action to reduce food gaps, protect and restore livelihoods and prevent acute malnutrition."⁵⁶ During March 2021 the Food and Agriculture Organization (FAO) estimated an even higher number of food insecure Namibians as a result of an outbreak of red locusts threatening crops. According to the FAO the number of food insecure Namibians was 440 000.⁵⁷

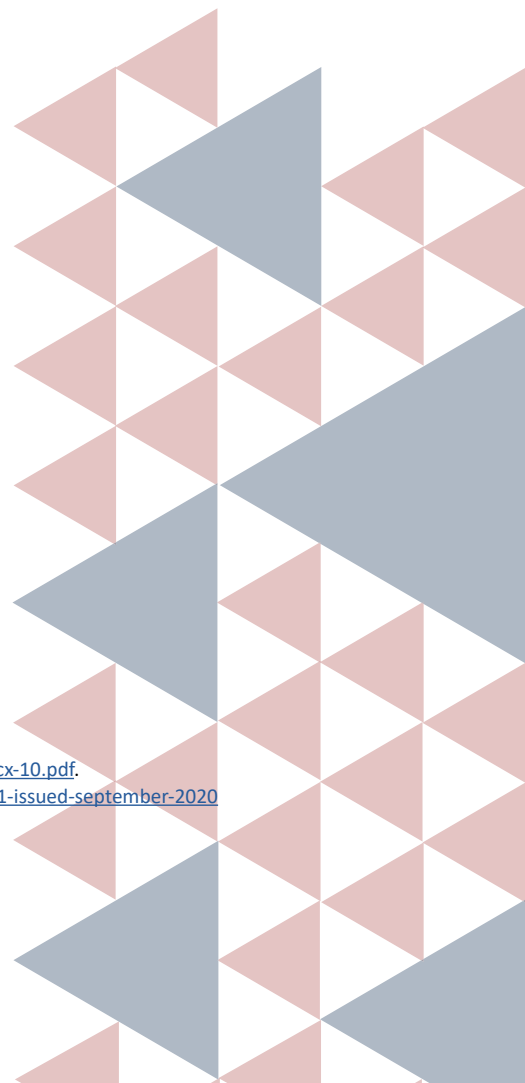
⁵³ <https://ippr.org/na/wp-content/uploads/2020/02/Agriculture-in-Namibia-An-Overview.docx-10.pdf>

⁵⁴ <https://www.namibiansun.com/news/economic-transformation-through-agri-investment2021-03-26/>

⁵⁵ Accessed at <https://ippr.org/na/wp-content/uploads/2020/02/Agriculture-in-Namibia-An-Overview.docx-10.pdf>

⁵⁶ See <https://reliefweb.int/report/namibia/namibia-acute-food-insecurity-analysis-july-2020-march-2021-issued-september-2020>

⁵⁷ See: <https://www.namibiansun.com/news/pests-can-ruin-harvest-lead-to-food-insecurity2021-03-11>



5.2.3 The impact of the COVID-19 pandemic

With more than 70% of Namibians directly or indirectly dependent on agriculture⁵⁸ and with almost 15% of the total labor force employed in agriculture most businesses in the sector were deemed 'essential' and as a result could continue to operate uninterrupted during the state of emergency and throughout the lockdown period. But this did not mean that agri-businesses were unaffected by the pandemic.

Many operations faced transport and logistic pressures which had a negative effect on production as it affected their volumes and inputs.⁵⁹ The dairy sector, which is cost intensive, and had come to depend on spent grain to feed livestock, after fodder prices rose steeply due to the drought, were impacted by the ban on alcohol sales which put a halt on the production of spent grain, which is a by-product of brewing that can be used in animal feed.⁶⁰ Namibia's embattled Swakara pelts

sector, severely impacted by the prolonged drought, was faced with international travel bans and border closures, that hampered the international fur trade and reduced the country's ability to market and sell Swakara.⁶¹ Two online auctions of pelts failed and Swakara farmers face severe liquidity problems. For farmers who had diversified operations to include full-time farming alongside trophy hunting or tourism offerings, the global collapse of the tourism industry closed an important primary or secondary income stream.

Between 2018 and 2019 Namibia's poultry experienced strong growth, offering fresh and exciting opportunities to SME entrepreneurs. The pandemic's travel and social distancing rules led to the closure of formal and informal markets, hampering sales and reducing income. Moreover, border closures constricted the imports of necessary raw materials for the market.

5.3 The blue economy

The concept of a blue economy, as opposed to a green economy arising from terrestrial resources, is a relatively new idea that has emerged over the past decade, based on 'blue growth' underpinned by a sustainable use of maritime and freshwater resources. The World Bank and United Nations (UN) describe a Blue Economy as "*comprising the range of economic sectors and related policies that together determine whether the use of oceanic resources is sustainable. The Blue Economy concept seeks to promote economic growth, social inclusion, and the preservation or improvement of livelihoods while at the same time ensuring environmental sustainability of the oceans and coastal areas.*"⁶²

Globally, various sectors that are designated parts of a Blue Economy were affected by the pandemic. Travel, tourism, maritime transport, fisheries and seafood production experienced disruptions as a

result of closed borders, declining demand, sanitary and social distancing measures among other issues.⁶³

While marine resources are a main component of a Blue Economy, it encompasses a wide range of activities including but not limited to fisheries and aquaculture, coastal and marine tourism and recreation, port services, shipbuilding, energy, bioprospecting, and underwater mining and related activities, and more.

Ultimately, it is hoped that a Blue Economy policy and law framework will help countries, and thus the world, to ensure that socioeconomic development dependent on ocean and river resources can be managed without degrading the environments and ecosystems on which these systems are based.

⁵⁸ See http://www.xinhuanet.com/english/2020-06/09/c_139126583.htm.

⁵⁹ See <https://www.namibiansun.com/news/agriculture-still-feeling-the-pinch2020-10-21>.

⁶⁰ Accessed at <https://www.agriorbit.com/impact-of-covid-19-on-namibias-agricultural-industry/>.

⁶¹ Accessed at <https://www.namibiansun.com/news/liquidation-of-auction-house-hits-swakara2020-12-16>.

⁶² Accessed at <https://openknowledge.worldbank.org/bitstream/handle/10986/26843/115545.pdf?sequence=1&isAllowed=y>.

⁶³ Accessed at https://unctad.org/system/files/official-document/ditctedinf2020d2_en.pdf

5.3.1 Namibia's blue economy

Namibia's entire western border consists of 1 672 kilometers of mostly pristine desert environment squatting next to the cold Atlantic Ocean, two starkly different green and blue ecosystems rich with unique terrestrial life versus a fertile marine environment.

The Benguela Current Large Marine Ecosystem (BCLME) stretches northwards from South Africa, along Namibia's entire coastline, into Angola and is one of the richest ecosystems on earth. Like all marine environments around the world, the BCLME is vulnerable to human induced resource plunder and destruction.

Although Namibia's land-based agriculture sector has consistently faced difficult climatic and soil conditions, it is the most economically tapped environmental resource in Namibia currently. The potentially vast opportunities arising from a well-managed, policy and legislative driven Blue Economy sector to boost socio-economic wellbeing while protecting the environment, remain mostly untapped apart from a thriving, yet at times controversially managed, marine fishing industry.⁶⁴

Namibia's Atlantic Ocean forms part of the Benguela Current Ecosystem, which, while distinctively cold, is rich in marine resources and supports a large population of fish species. Moreover, tourism has tapped into the striking beauty of Namibia's coastline. Yet, experts agree that a unified Blue Economy holds as yet untapped opportunities.

According to preliminary national accounts released by the NSA, Namibia's fishing and fish processing on board in 2020 contracted by 9.4% in real terms, compared to positive growth of 8% y/y in 2019. The NSA attributed the weak performance to lower volumes of fish landed. In nominal terms, fishing and fish processing on board in 2020 contributed N\$4.507 billion to Namibia's GDP of N\$176.3 billion. It contributed 2.6% to the GDP, the same as in 2019.

In December 2020 Namibia's president Hage Geingob reiterated the country's commitment to

restore marine and coastal ecosystems in order to reduce ocean pollution, benefit more from marine resources and boost the economy. The President's office launched the Transformations Document on Sustainable Ocean Economy which set out Namibia's targets for good ocean management, and a commitment to establish and enact Sustainable Ocean Plans by 2025. Back in 2018, 14 countries, including Namibia, agreed to work together to devise a mechanism to protect the ocean in order to continue to derive maximum benefit from it and in the wake of COVID-19, the 14 countries, including Namibia, Canada, Kenya, Mexico and others said they commit to "sustainably manage 100% of the ocean area under national jurisdiction, guided by Sustainable Ocean Plans, by 2025."^{65,66}

Namibia's fisheries industry is well-established, but has been, at times, overshadowed by corruption and lack of transparency. Moreover, concerns have been raised over the mismanagement of limited ocean resources and illegal fishing operations along the coast of Namibia.⁶⁷

Although most of Namibia's vast coastline is uninhabited, key towns such as Walvis Bay, Swakopmund, and Lüderitz have developed thriving industries around fishing and tourism. While tourism has sustained well documented and far-reaching harm from the COVID-19 pandemic, it is unclear what the impact has been on the fishing industry.

Meanwhile projects such as the mining of phosphates off Namibia's coastline, parts of which are believed to be the largest identified marine phosphate deposit in the world, have been paused amid concerns of its environmental impact as well as lack of transparency.⁶⁸

⁶⁴ https://ippr.org.na/wp-content/uploads/2019/02/BlueEconomy_WEB-1.pdf.

⁶⁵ Accessed at <https://www.namibiansun.com/news/plan-for-ocean-economy-by-20252020-12-03>.

⁶⁶ <https://www.oceanpanel.org/ocean-action/files/transformations-sustainable-ocean-economy-eng.pdf>.

⁶⁷ https://ippr.org.na/wp-content/uploads/2019/02/BlueEconomy_WEB-1.pdf.

⁶⁸ Accessed at <https://www.frontiersin.org/articles/10.3389/fmars.2020.00586/full#B179>.

5.3.2 Current plans

Namibia's 5th National Development Plan (NDP5) was the first official government step towards defining the concept of a Blue Economy for the country. The NDP5 stipulated that by 2022, Namibia will have implemented a Blue Economy governance and management system that sustainably maximizes economic benefits from marine resources and ensures equitable marine wealth distribution for all Namibians. But to date, there is little to no official progress reported on the targets set by the NDP5, which includes the development of a Blue Economy governance structure by 2019/2020 or on the undertaking that Blue Economy baseline indicators should be in place by 2020/2021. There appears to be difficulties in achieving these targets and it is unsure when the structures will be functional.⁶⁹

5.3.3 Blue is the new green

The World Bank and UN underline that apart from traditional ocean industries, the concept provides for new and emerging industries such as offshore renewable energy, aquaculture, seabed extractive activities, and marine biotechnology and bioprospecting. Moreover, a number of services provided by ocean ecosystems, and for which markets do not yet exist, also contribute significantly to economic and other human activity such as carbon sequestration, coastal protection, waste disposal and the existence of biodiversity.

In February 2020 the African Union (AU) launched the African Blue Economy Strategy, after it had designated the years 2015 to 2025 as the 'Decade of African Seas and Oceans.'⁷¹ The threat of over-exploitation and mismanagement remains real. Kitenge underlines that a well-organized, managed

A 2019 report on the future of a Namibian Blue Economy underlined that various challenges exist to realize the goal of a Blue Economy, which will depend not only on the finalization of the official policies and legislation, but a number of other factors. The report cautioned that the targets set to establish the underlying policy frameworks could be over-ambitious and cites the scarcity of accurate scientific, environmental and economic data as a key problem for the establishment of a well-informed Blue Economy framework.⁷⁰

and transparent Blue Economy could provide critical jobs, development opportunities and sturdy safety-nets to African countries, who often neglect water-based resources while focusing intensely on terrestrial resources⁷².

Despite the optimism, the world's oceans are facing unprecedented challenges, and the push for blue economies to complement land based green economies are accompanied by some concern. One source cautions that "[L]arge-scale Blue Economy initiatives prioritise economic gains at the expense of environmental degradation and the exclusion of local communities"⁷³ and lists COVID-19 as the latest challenge for achieving Blue Growth in Africa.

⁶⁹ https://commons.wmu.se/cgi/viewcontent.cgi?article=2122&context=all_dissertations.

⁷⁰ Accessed at https://ippr.org.na/wp-content/uploads/2019/02/BlueEconomy_WEB-1.pdf.

⁷¹ See <https://www.africanews.com/2021/04/08/focusing-on-africa-s-growth-and-the-potential-of-the-blue-economy-by-mr-mokrane-sabri/>.

⁷² <https://www.nepad.org/news/blue-economy-africas-untapped-potential-economic-growth>.

⁷³ <https://www.frontiersin.org/articles/10.3389/fmars.2020.00586/full>.

6. Findings

6.1 The samples

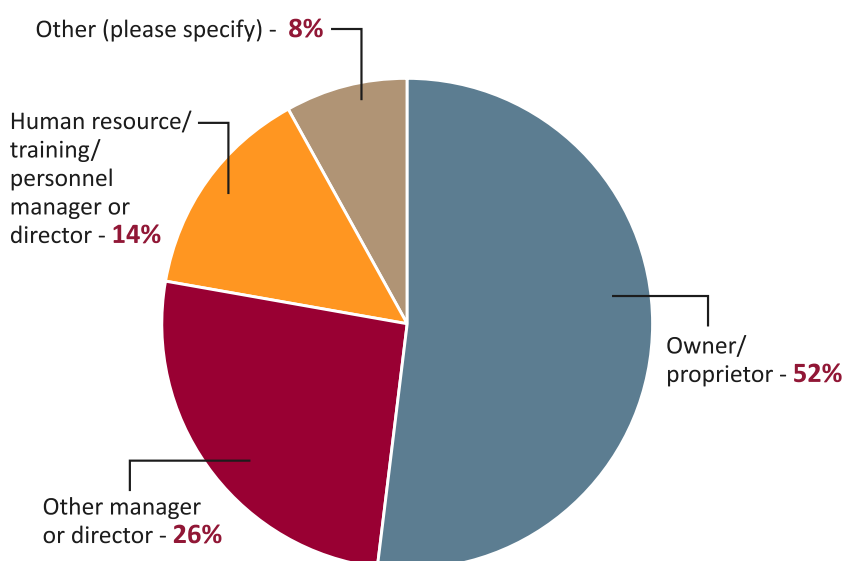
6.1.1 Business survey

Figure 1 below shows that more than half the respondents (52%) are also the owner of the business they report on. Slightly more than one-tenth (14%) are from the human resources or related departments whilst 26% are managers or directors

from departments other than human resources. The remaining 8% consists of a variety of positions including chief financial officer, financial manager, accountant, and office managers.

Figure 1: Respondent job title

Question: What is your job role? (n=133)



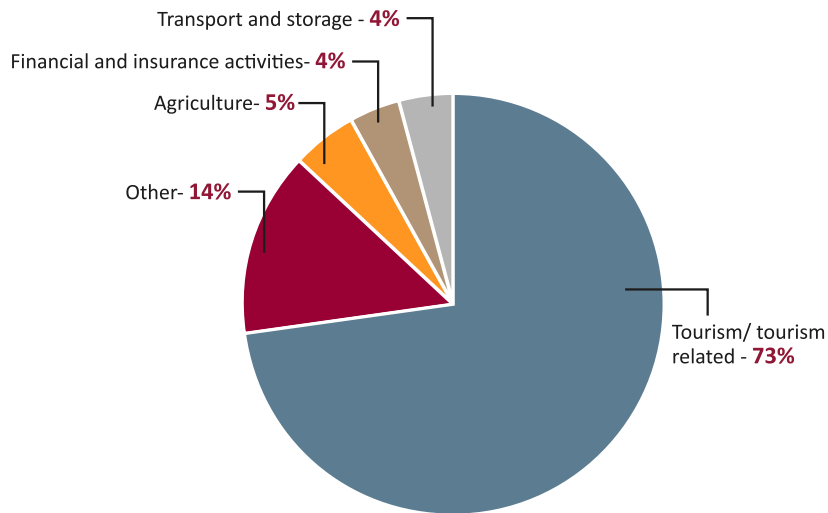
Source: Employer skills needs survey

The following are key features of the business sample:

- Most entities interviewed (87%) were private companies, 9% were government agencies, 2% were cooperatives, and 2% were non-profit organisations.
- By far the majority of companies in the sample (73%) are active in tourism and tourism-related activities. Other sectors include agriculture (5%) and transport and storage (4%), and financial and insurance (4%) (**See Figure 2**).
- Only 39% of the businesses in the sample recognise a trade union or an employee association. This means that 57% of the sample's workers will not be represented when terms and conditions of work are negotiated. This is likely due to the fact that most businesses are micro or small businesses that employ only small numbers of staff (**See Figure 10**).

Figure 2: Main business activity

Question: What is the main business of the establishment you work for? (n=131)



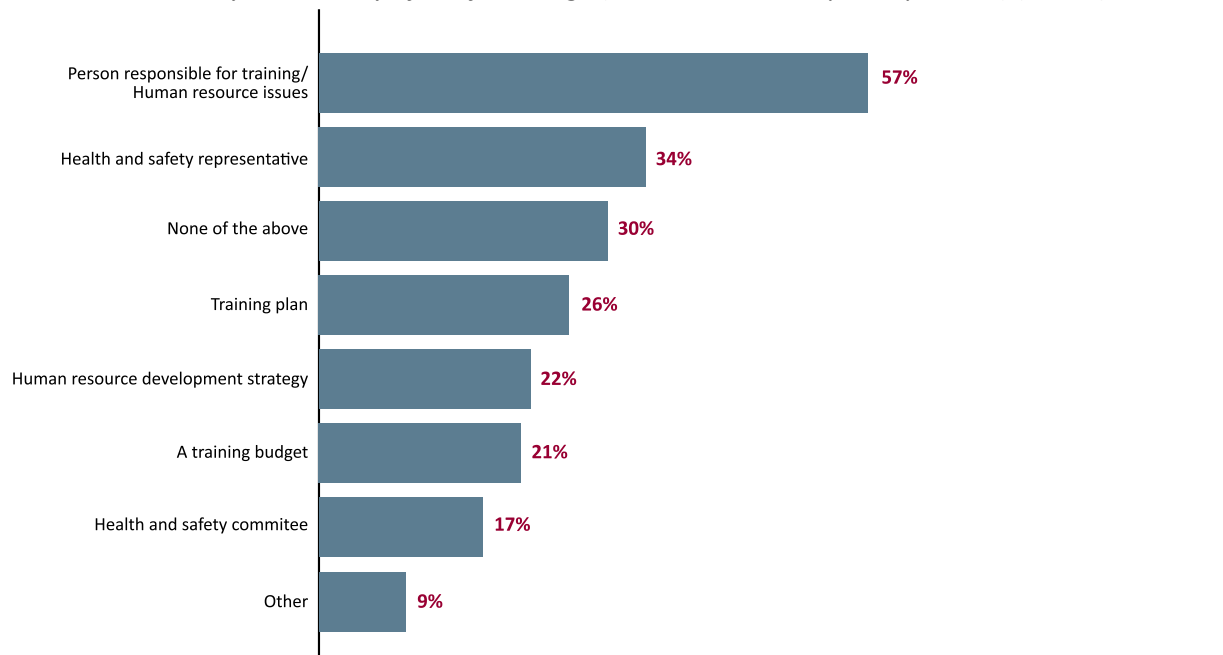
Source: Employer skills needs survey

Figure 3 hereafter lists some of the key features of the businesses included in the sample. More than half the companies in the sample (57%) have in their employment someone who is responsible for training and/or human resource issues and 34% have a health and safety representative. This should put these enterprises in a potentially favorable position to take advantage of possible new training programs and health and safety initiatives related to COVID-19 during the recovery phase.

Yet, only slightly more than one-in-five (26%) of businesses have a training plan and even less have a human resource development strategy (22%) and a training budget (21%). This could make participating in new training initiatives problematic and difficult to implement, especially for the smaller business who are the ones with the biggest shortfalls in this regard. They may need assistance with training during a possible recovery.

Figure 3: Key business features

Question: Do you have any of the following? (More than one response possible) (n=105)



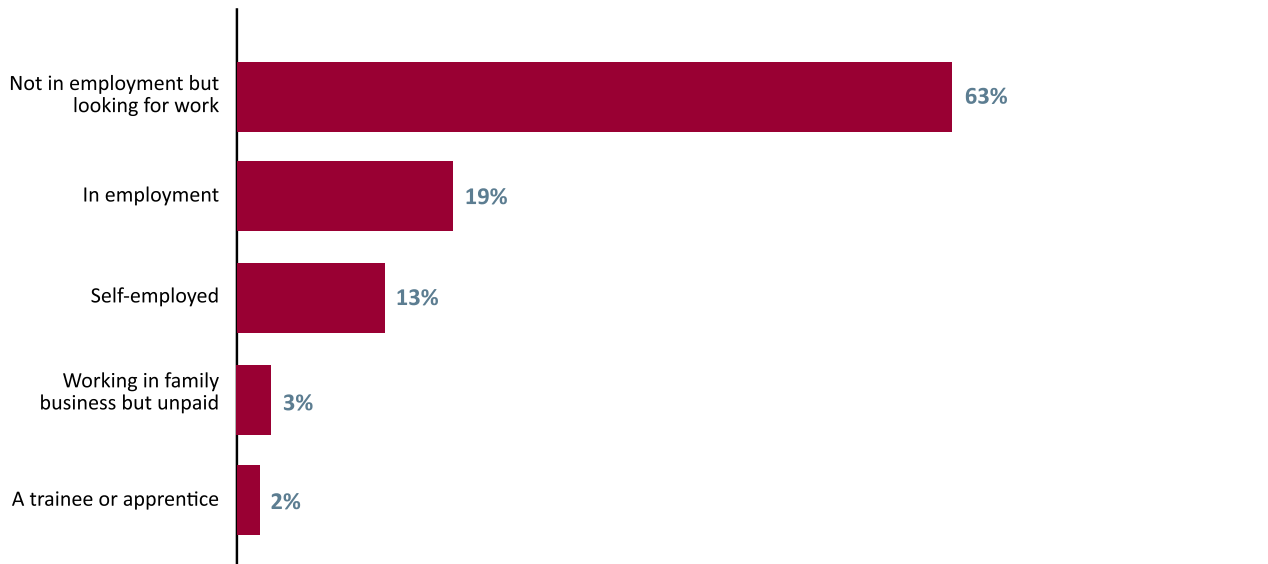
Source: Employer skills needs survey

6.1.2 Individual survey

About the individuals in the sample, Figure 4 shows that most of those surveyed (63%) were unemployed looking for work at the time of the survey. Close to one-in-five (19%) were employed and 13% were self-employed.

Figure 4: Current employment (%)

Question: At the current time, are you ...? (n=325)



Source: Individual skills needs survey

The individuals in the sample had the following characteristics⁷⁴:

- Most respondents (59%) were male; women thus comprised 41% of the sample.
- The sample is made up of young people. Some 85% of the sample is between 26 and 35 years of age, and 99% of the sample is between 21 and 45 years old.
- Nearly all respondents (94%) have a qualification from a community college or an intermediate diploma or post-secondary vocational training.
- Only 16% are trade union members or members of an employee association.
- All, except one individual were born in Namibia.

⁷⁴ Only 239 of the original 325 individual respondents answered the questions in the demographic section of the survey. This section was at the end of the questionnaire.

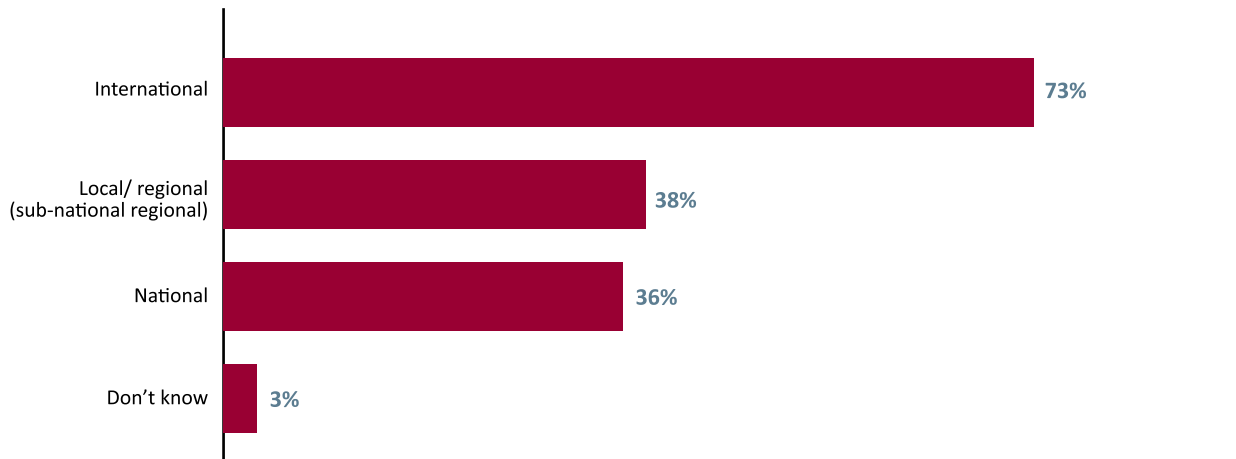
6.2 Business characteristics

Figure 5 hereafter shows that most of the businesses in the sample have an international market component (73%) in addition to local/regional (38%) and national (36%) components. The international exposure seems high but reflects the strong presence of tourism companies in the sample (see Figure 6). This means that these companies were particularly

vulnerable to the impacts of the pandemic right from the very start. The higher proportion of companies catering for local and regional markets as opposed to national markets, is a result of the larger number of micro and small companies in the sample (see Figure 7 below).

Figure 5: Main markets (%)

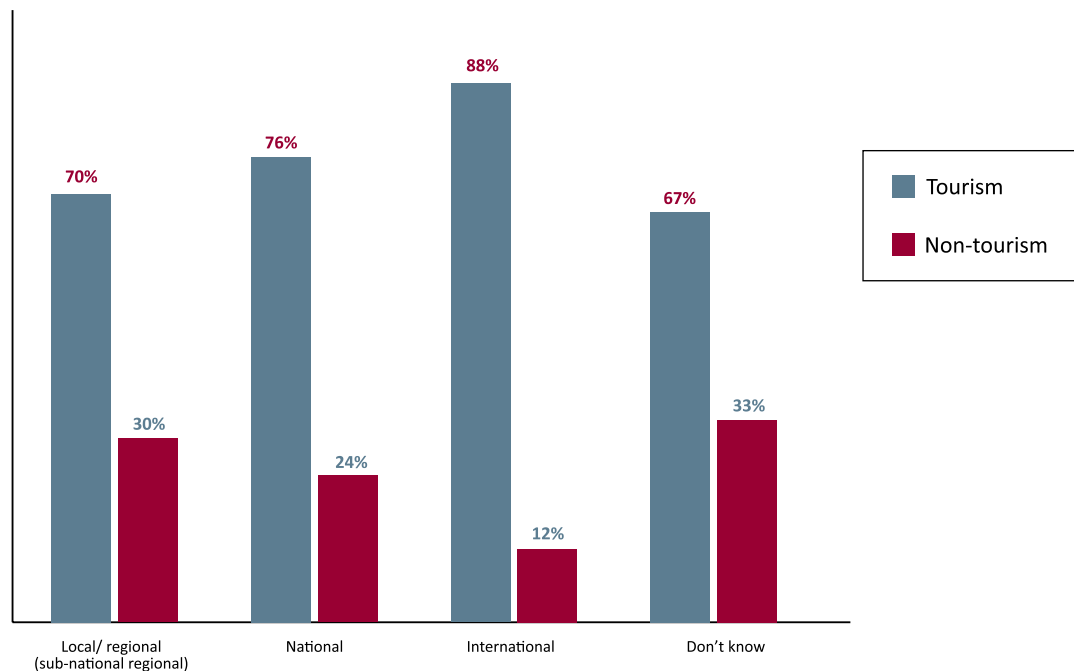
Question: At the end of 2019, what were the main markets for the goods and services your establishment produces? (More than one response possible). (n=133)



Source: Employer skills needs survey

Figure 6: Main markets by tourism and non-tourism (%)

Question: At the end of 2019, what were the main markets for the goods and services your establishment produces? (More than one response possible.) (n=133)



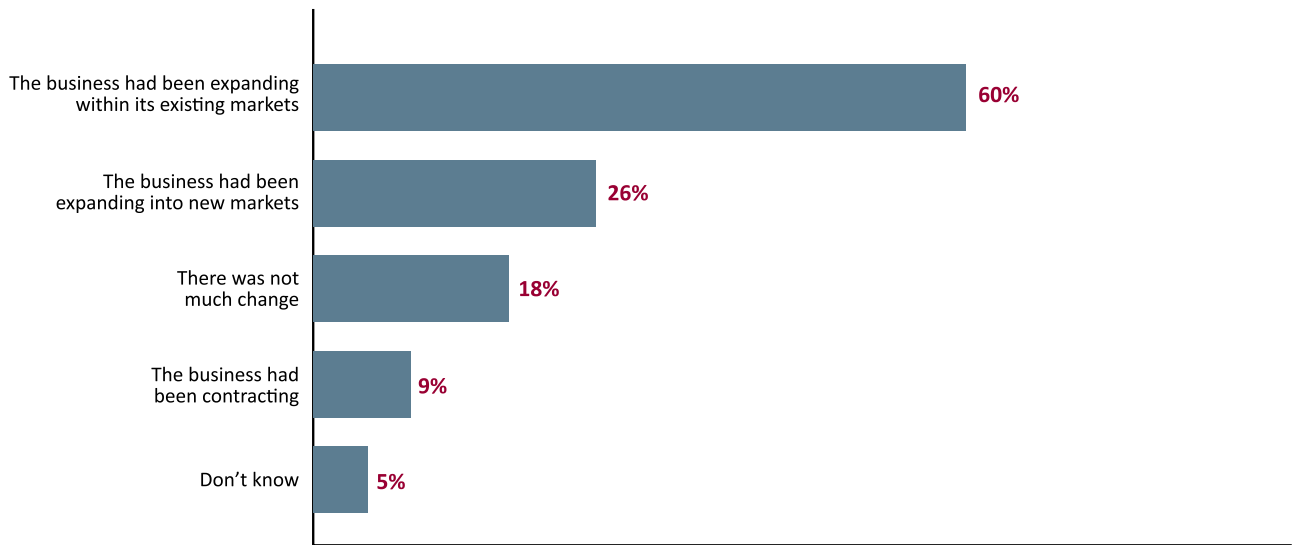
Source: Employer skills needs survey

Figure 7 shows that almost one-in-ten (9%) businesses were contracting in years preceding the COVID-19 pandemic. Almost one-in-five (18%) entered the pandemic during a stagnant stage with no change from the years preceding the pandemic. Significantly more than half the businesses (60%) in the sample were expanding within their existing

markets whilst at least one-quarter (26%) were expanding into new markets when the pandemic arrived. Thus, overall, 86% of businesses report that they were expanding during the three years preceding the pandemic. These are mainly in the tourism sector.

Figure 7: State of business up to 2019 (%)

Question: Thinking about the three years upon to the end of 2019, what best describes the situation in the establishment you work for? (More than one response possible.) (n=133)



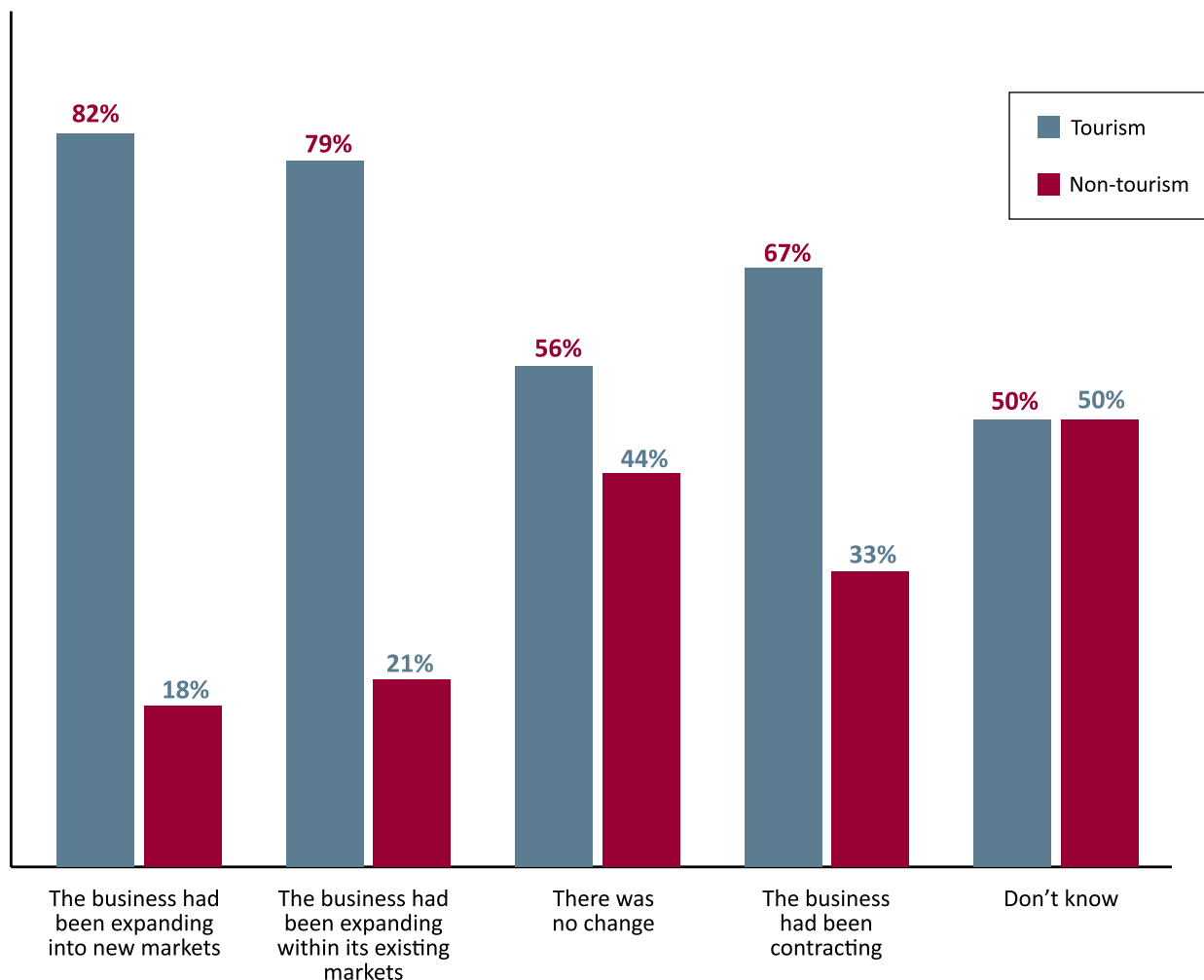
Source: Employer skills needs survey



Figure 8 hereafter shows that by far most of the tourism business were expanding within their existing markets (82%) whilst 79% were expanding into new markets when the pandemic arrived.

Figure 8: State of business up to 2019 by tourism and non-tourism (%)

Question: Thinking about the three years upon to the end of 2019, what best describes the situation in the establishment you work for? (More than one response possible.) (n=133)



Source: Employer skills needs survey

Figure 9 shows that the financial impact of the COVID-19 pandemic for most enterprises in the sample has been severe.

Three quarters (75%) of all companies in the sample reported that their entities were either in a very strong (21%) or strong (54%) financial position at the start of the pandemic and only 22% were in a weak financial position. A mere 2% were about to go out of business.

The impact is obvious when companies' past and current financial positions are compared.

Firstly, the number of companies that are 'about to go out of business' has increased significantly from 2% to 15%. This suggests another possible wave of retrenchments or job losses sometime later this year as businesses continue to struggle with low demand and serious cashflow constraints (*see Figure 7 hereafter*).

Secondly, the number of companies that reported being 'very strong' or 'strong' financially now has dropped quite significantly from those who say they

were in such a position in 2019, dropping 59 percentage points from 75% to 16%. Only 2% of businesses in the sample described their current financial position as 'very strong' and only 14% described it as 'quite strong'.

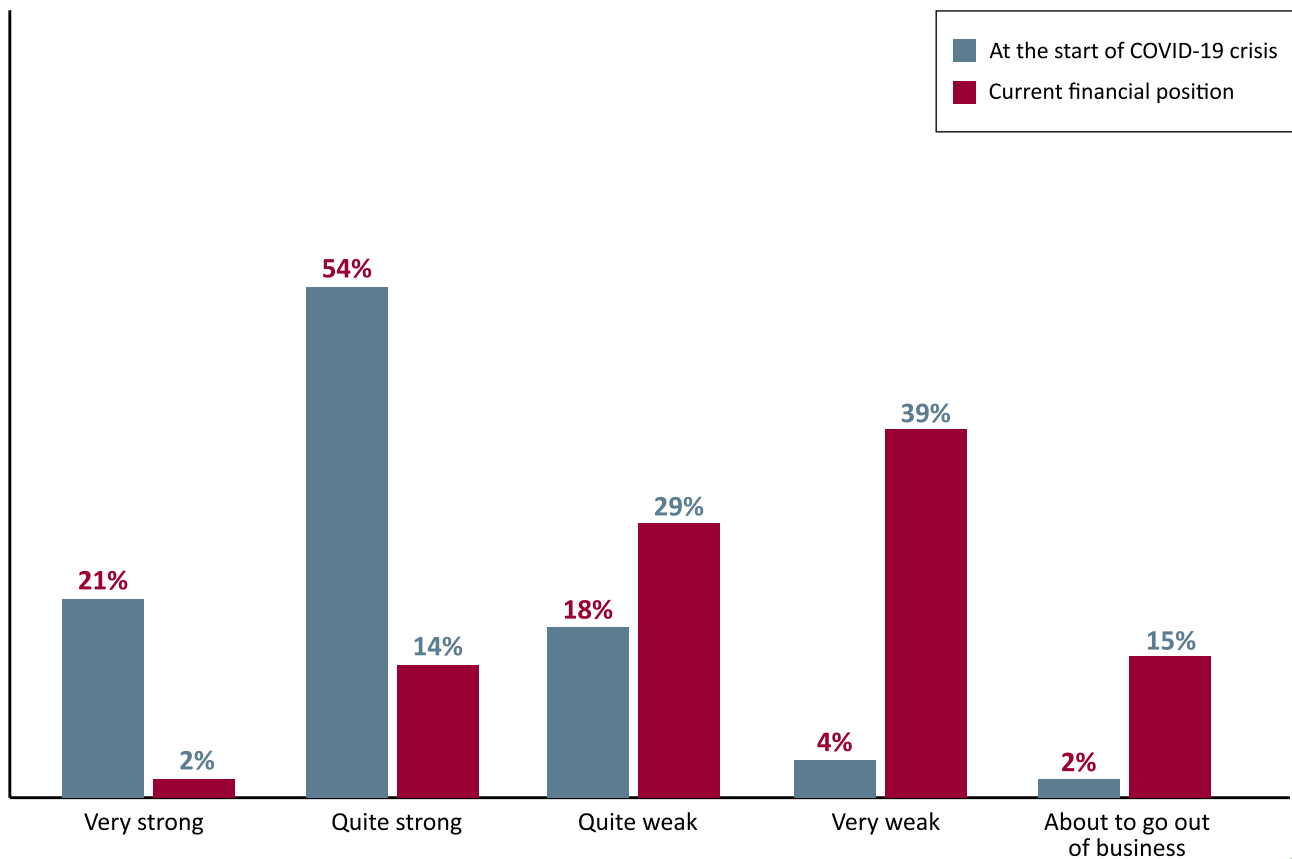
Thirdly, those who described their financial position as 'quite weak' (29%) or 'very weak' (39%) is significantly higher now, rising 46 percentage points from 22% to 68%.

The overall financial picture for these entities looks bleak and many would require some form of

assistance if they were to continue operating. This is especially true for companies in the tourism and related sectors where experts have now estimated a return to pre-COVID-19 levels of business in 2024 only (**See Figure 8 hereafter**). Many of the existing tourism entities will not be able to survive on the subsidized local rates that have formed part of the sector's survival strategy. It is possible that many of the smaller businesses have already implemented retrenchments and/or wage reductions, which means that if the situation continues for much longer, they will face the real prospect of going out of business.

Figure 9: Past and current financial position (%)

Question: Generally speaking, when the COVID-19 crisis started would you say that this establishment's financial position was ...; And how would you describe this establishment's financial position now? (n=103)

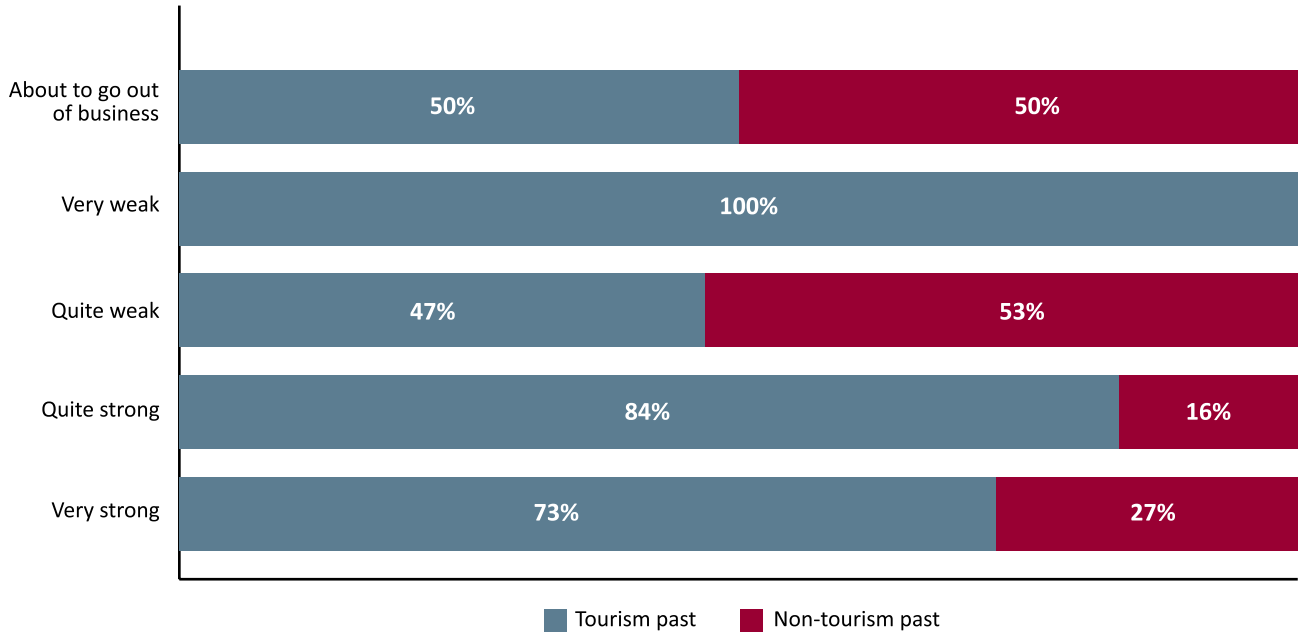


Source: Employer skills needs survey

Figure 10 and 11 compares past and current financial position for tourism and non-tourism businesses. Of the 15% of businesses that stated that they were about to go out of business in the overall sample, 73% were tourism businesses.

Figure 10: Past financial position by tourism and non-tourism (%)

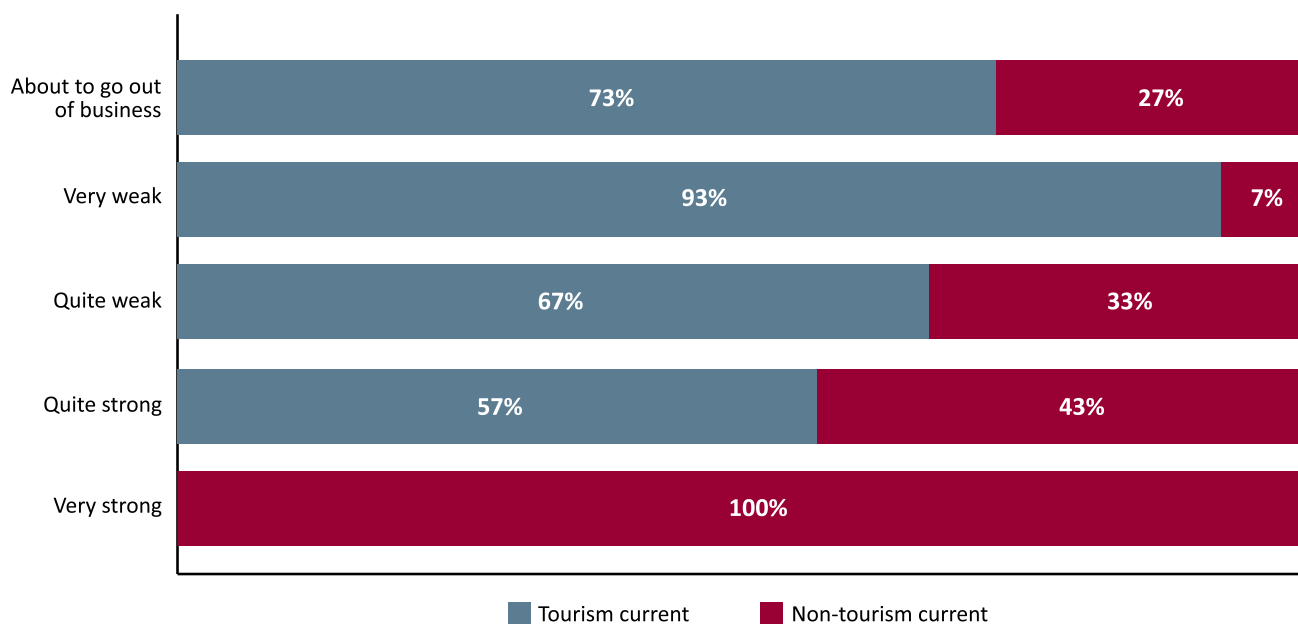
Question: Generally speaking, when the COVID-19 crisis started would you say that this establishment's financial position was ... (n=103)



Source: Employer skills needs survey

Figure 11: Current financial position by tourism and non-tourism (%)

Question: And how would you describe this establishment's financial position now? (n=103)



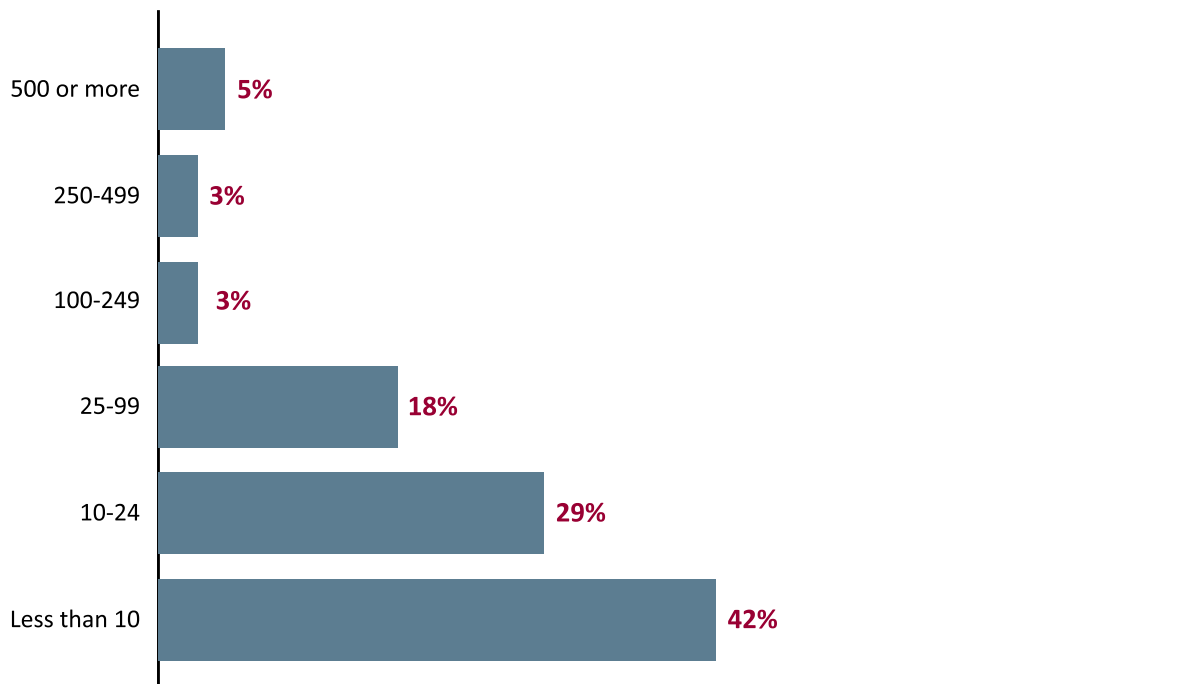
Source: Employer skills needs survey

6.3 Employment

Most businesses in the sample are either micro, small or medium enterprises (MSMEs) if the number of staff employed are used as the sole criteria for classification⁷⁵. More than four-in-ten (42%) of companies in the sample had less than ten employees whilst 29% employed between 10 and 24 employees. Some 18% employed between 25 and 99 staff members whilst less than 10% employ more than 250 staff members (see Figure 12 below).

Figure 12: Current number of employees (%)

Question: How many people are currently employed in the establishment where you work? (n=125)



Source: Employer skills needs survey

Employment decreased since the end of 2019 in 58% of businesses surveyed. Only in 10% of businesses did it increase and in 30% it remained the same. This highlights another enormous impact of the COVID-19 pandemic on employment. Not only did companies deteriorate financially, but many also had to retrench staff. Both these strategies will have an impact on their capacity to recover once the brunt of the pandemic has passed.

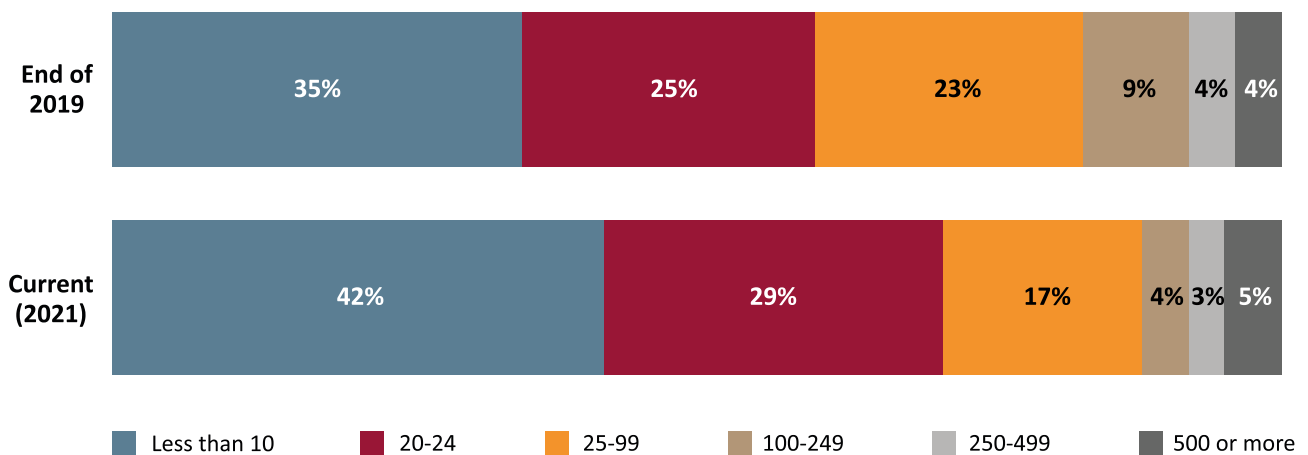
⁷⁵ The new Government of Namibia policy defines MSME according to two criteria; the number of employees and annual turnover. A micro business is defined as having up to ten employees and an annual turnover of up to N\$300,000. A small business has 11 to 30 employees and an annual turnover of up to N\$3 million. A medium business has 31 to 100 employees and an annual turnover of up to N\$10 million. Any business exceeding these criteria is regarded as large.

Figure 13 compares current employment with employment at the end of 2019. The first trend worth highlighting is that employment remained stable for large companies, that is, those companies employing more than 250 individuals. A second trend is that the biggest changes in employment occurred in companies with less than 100 employees. It is the smallest enterprise that suffered worst of all. In 2019, 35% of companies employed less than 10 people; in 2021 that number increased to 42%, a change of 7 percentage points.

The proportion of businesses that employ between 25 and 99 staff decreased by 6% and those that employ between 100 and 249 employees decreased by 5%. This reduction in staff means that businesses have shrunk in size, which not only will affect their capacity to recover but will also have possible implications for the speed or rate of recovery.

Figure 13: Number of employees – end 2019 vs. Current (2021) (%)

Question: How many people are currently employed in the establishment where you work? (n=125) and; At the end of 2019, how many people were employed in the establishment where you work?

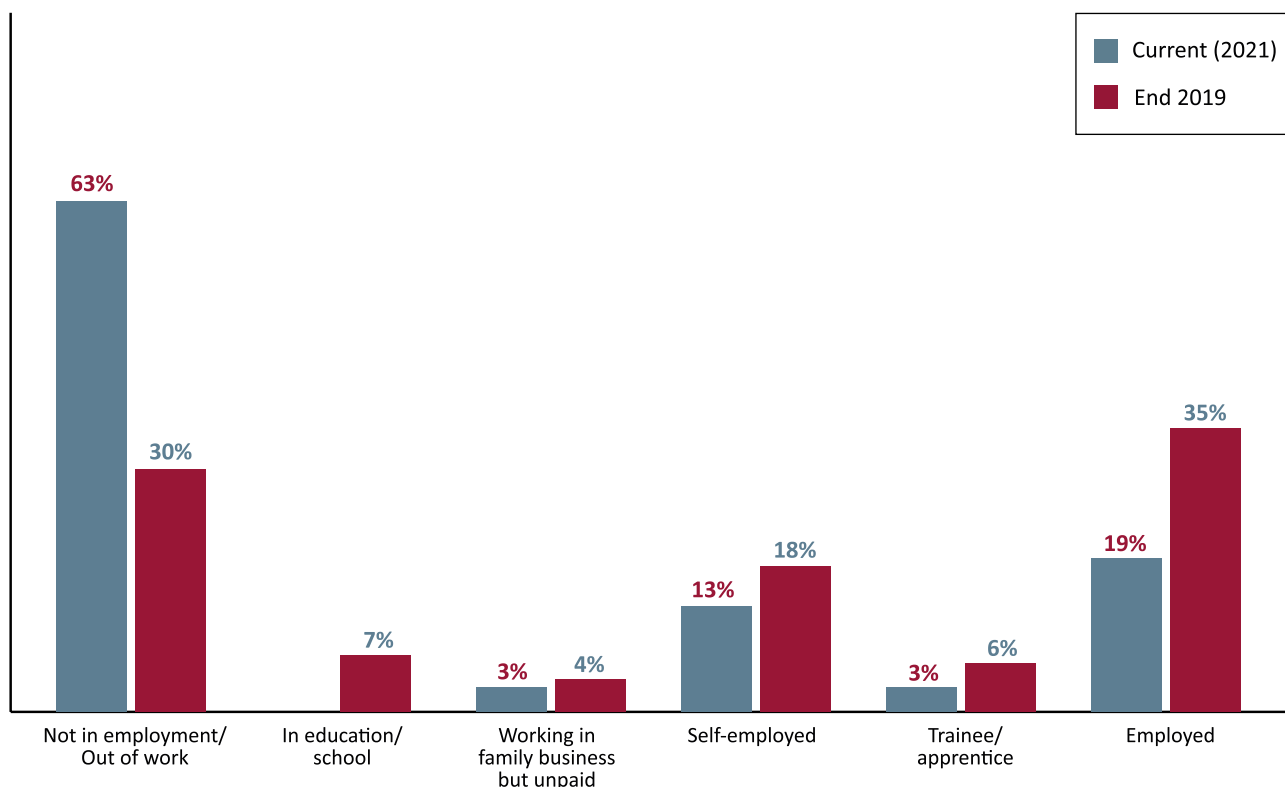


Source: Employer skills needs survey

Figure 14 shows that unemployment increased significantly among the individuals in the sample. The number of individuals with employment in 2019 (35%) dropped with 16 percentage points to just 19%. The number of individuals unemployed and looking for work more than doubled from the end of 2019 (30%) to early 2021 (63%) when the survey was done. The number of self-employed also declined, with 5 percentage points.

Figure 14: Employment status – end 2019 vs. Current (2021) (%)

*Question: What you were doing at the end of 2019 before COVID-19 crisis commenced. Were you?;
And, At the current time are you ...? (n=325)*

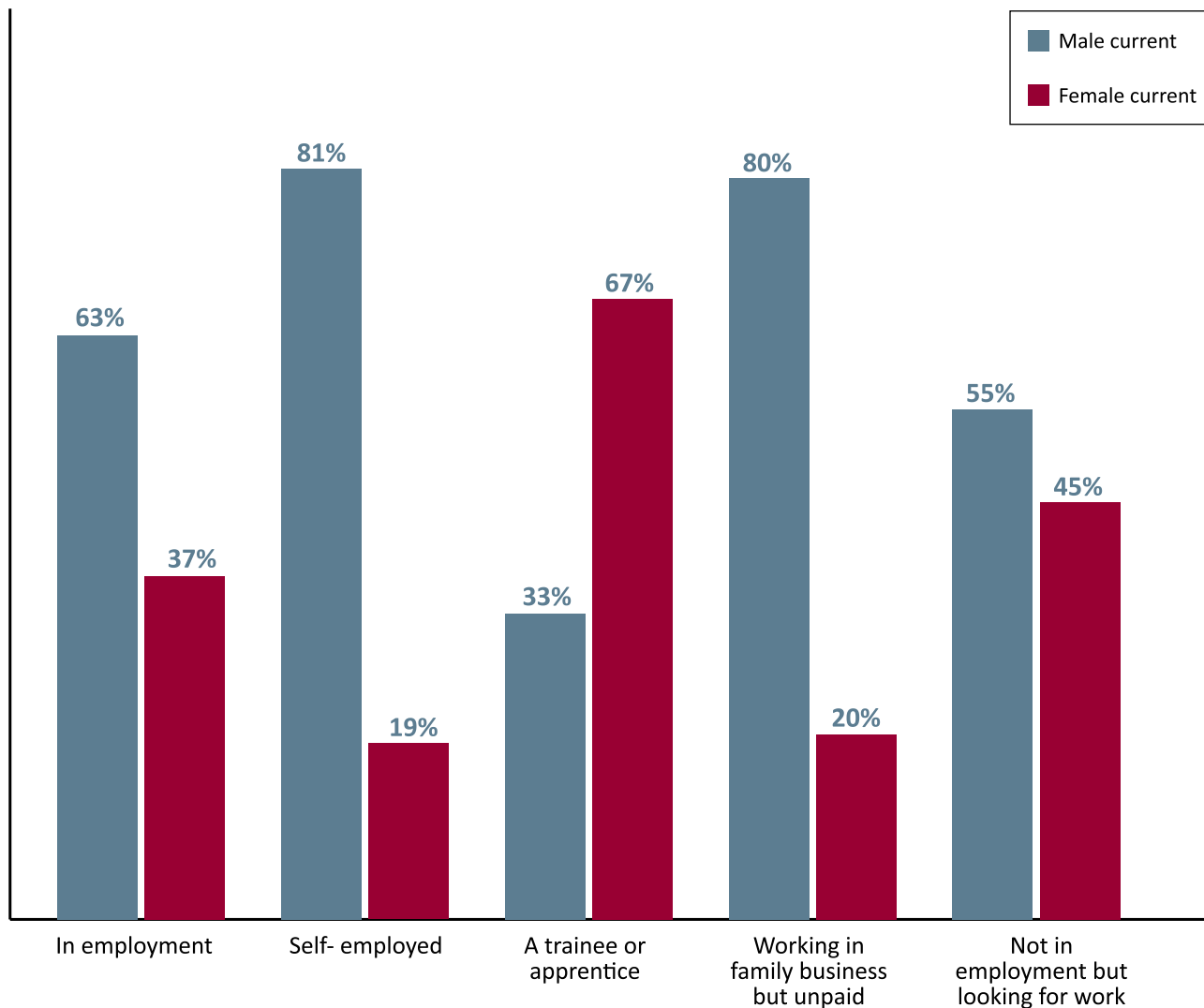


Source: Individual skills needs survey

Figure 15 hereafter shows employment status by male and female, compared for the businesses' current status at the end of 2019 and currently (2021). Of the 19% of individuals who are currently employed, 63% are male, and 37% are female.

Figure 15: Current employment status by male/female (%)

Question: At the current time are you ...? (n=239)



Source: Individual skills needs survey

With the small sample of employed individuals, it is impossible to provide a meaningful breakdown of type of job, sector of employment or job titles as the numbers are simply too small. But we identify a number of issues that may be important for understanding some important issues in a more qualitative manner.

These include the following:

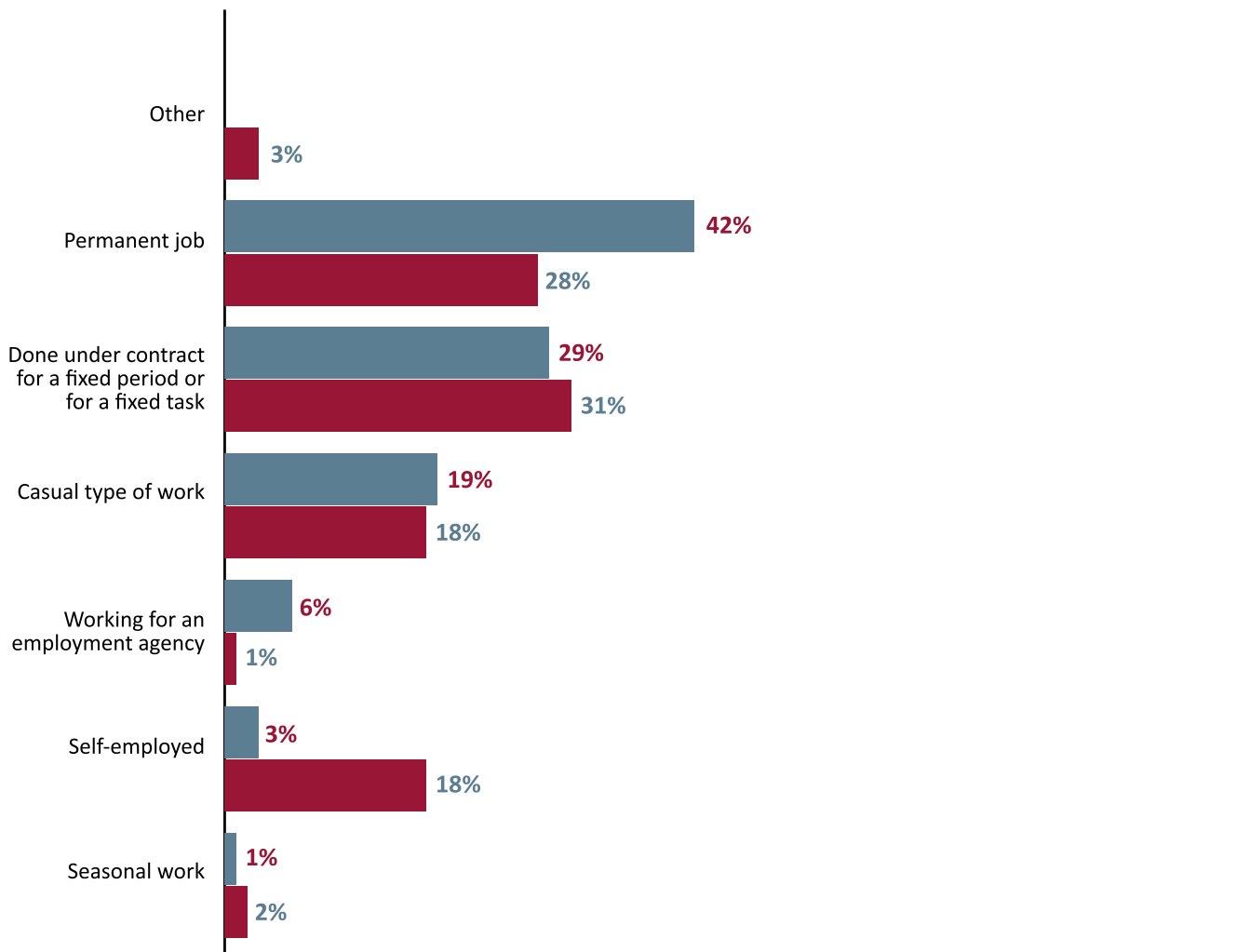
- The majority of the sample worked as technicians, sales staff or held elementary employment.
- Many worked in construction, mining and quarrying and manufacturing. A few worked in electricity, wholesaling and food and accommodation.
- By far the majority of employed individuals worked at their current place of employment when the pandemic hit.

Figure 16 shows that at the end of 2019 about one-third (31%) of employed individuals performed contract work, i.e., they are employed only for a fixed period or task. Less than that, 28%, worked permanent jobs, whilst almost one-in-five (18%) provided their own employment.

Another 18% were casual workers. Of those who are employed in 2021 (n=69), 42% hold a permanent job, 29% perform contract work and 19% are casual workers.

Figure 16: Job security – end 2019 vs. Current 2021 (%)

Question: Is your current job permanent or nor permanent? (n=69) and; Was your job permanent or not permanent? (n=187)



Source: Individual skills needs survey

The number of self-employed individuals in the sample (41 individuals) is also very small making it difficult to report detailed results with any degree of reliability. But the following qualitative trends are reported here to help understand the challenges of self-employed individuals during the pandemic.

- When reporting the year in which they became self-employed, most individuals surveyed mention a year pre-dating the COVID-19 pandemic. But, when asked if they became self-employed as a result of COVID-19, more individuals responded with affirmative answers. These apparently contradictory responses raise doubt about the consistency of the responses to this question.
- Most of the individuals who left their previous jobs did so because their contracts came to an end.
- Those who became self-employed mainly did so because it was 'the only option available'.
- Most self-employed individuals are the only employer in the business. Most who do have employees, typically employ one to four employees.
- The majority of those self-employed individuals have not registered their operations and as such operate in the informal sector.
- A very large majority felt they face competition from other registered companies.
- A significant number of self-employed individuals described their jobs as that of a 'manager' or 'technician'.
- Most work from either their usual places of work, or from home. Just over half saw no change in their working arrangements and continues to work with no change in working arrangements during the pandemic.



6.4 Coping strategies

When COVID-19 arrived in Namibia during March 2020 the Government of Namibia reacted swiftly to implement stringent measures to slow down the spread of new infections and “flatten the curve”. It implemented a hard lock down that required all non-essential businesses to close down or work from home, that prohibited international travel and severely limited local travel. The wearing of face masks in public spaces, social distancing requirements and increased hygienic measures such as frequent handwashing and usage of hand sanitizer all formed part of the anti-pandemic response.

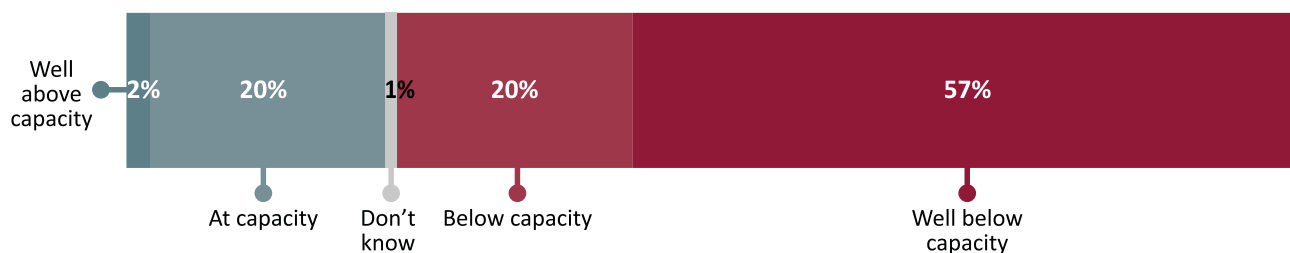
One study⁷⁶ looking at the impact of the pandemic on businesses found that between two and four months into the pandemic less than half the businesses in that sample (44%) were

fully operational and working onsite, 4% were operational but working off-site, 34% were only partially open and 19% were closed altogether.

Figure 17 hereafter shows that nearly one year later the majority of businesses (77%) still operate below full capacity. Of these, more than half (57%) operate ‘well below’ capacity. This may well be in the tourism and related sectors where demand is still severely impacted and international travel is still struggling as a result of the ongoing pandemic globally. This furthermore suggests that it may well be too early to refer to the current situation as the start of a recovery period, especially for small MSME’s involved in tourist and related activities.

Figure 17: Current production level (%)

Question: Would you say your establishment is currently working: well above capacity, below capacity, well below capacity, don't know? (n=111)



Source: Employer skills needs survey

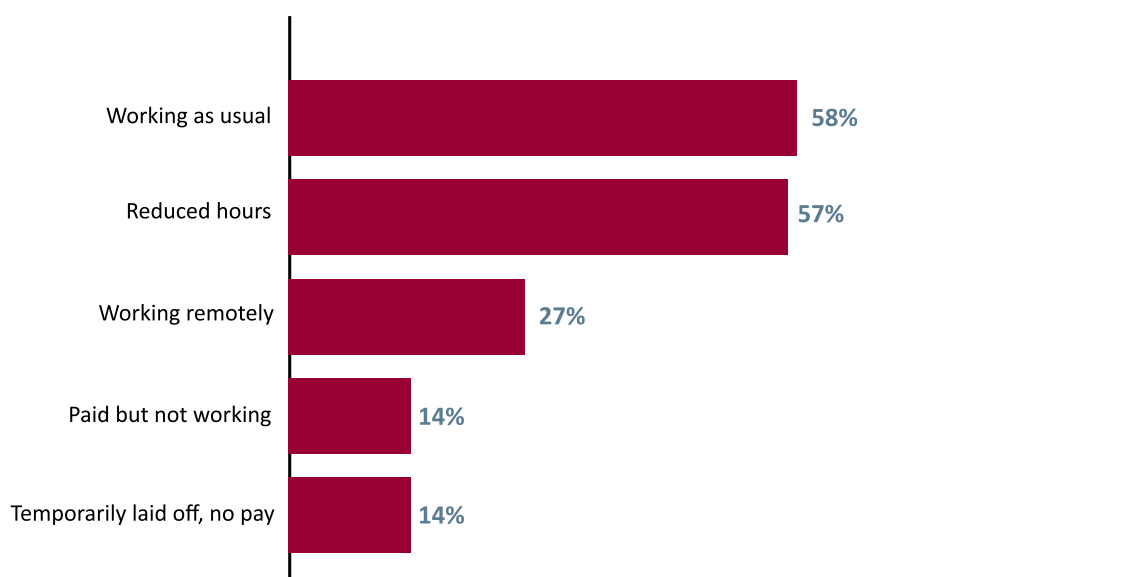
⁷⁶ See C Keulder and L Stoman

Figure 18 shows that many of the coping strategies initially adopted to reduce the effect of the pandemic among businesses, are still in place more than a year later. These include:

- In 27% of businesses surveyed, at least some workers still work remotely.
- In 57% of businesses, at least some workers still work reduced hours (for reduced pay).
- In 14% of businesses, at least some workers still receive pay but is not back at work.
- In 14% of the enterprises in the sample, at least some workers are still on furlough, i.e., temporarily laid off with no salary or wage.
- In 58% of businesses, at least some workers work as usuals.

Figure 18: Current working conditions for employees (%)

Question: Of those who remain in employment, approximately what percentage are currently ...? (n=92)



Source: Employer skills needs survey

Almost two thirds of the individuals in the sample indicated that they are currently working on-site, i.e., their usual places of work. Close to half of all employed individuals indicated that that was not the case during the past year of the pandemic, thereby suggesting that their working conditions changed during the past year. Two-thirds of those employed indicated that they currently work less than 20 hours per week, and almost 70% work less than 30 hours per week. This could indicate the impact of the coping strategy to reduce working hours employed by many businesses. More than one-third of the employed individuals reported that their working hours had been reduced, whilst almost half reported that it remained the same. Only a very small minority reported an increase in working hours.

About two-in-five individuals reported a reduction in salaries whilst more than half of the employed workers reported no loss in salaries.

Most self-employed individuals in the sample report that they work between 1 and 10 hours per week and a very small number work more than 50 hours. Most report that their working hours have decreased since the pandemic started, and nearly all report that their earnings have declined too. This decline, they ascribe to a decrease in the rates paid for their work. The majority also report a decline in the amount of paid work they must do, and about two-thirds of self-employed individuals would be looking to return to fixed-employment rather than remain self-employed. They also report that it will be 'very likely' or 'quite likely' that they will return to fixed employment.

6.5 Changes in employment

A previous survey⁷⁷ found that during the data collection period of 4 May to 23 July 2020 more than one-in-four (65%) retrenched staff. A further 8% planned to do so. Companies' operational status played a part in the number of staff retrenched. Companies that were closed or partially operating at the time of the interview were much more likely to retrench more staff than those fully operational. Almost 70% of companies that were closed at the time of interview had retrenched more than 41% of staff, and 44% of those that were operating with partial capacity had retrenched the same proportion. In contrast only 23% of fully operational companies who did retrenchments, retrenched 41% or more of their staff.

Furthermore, the longer the pandemic lasts, the more likely businesses were to retrench staff. Companies interviewed later in the survey, were far more likely to retrench more staff than those interviewed earlier.

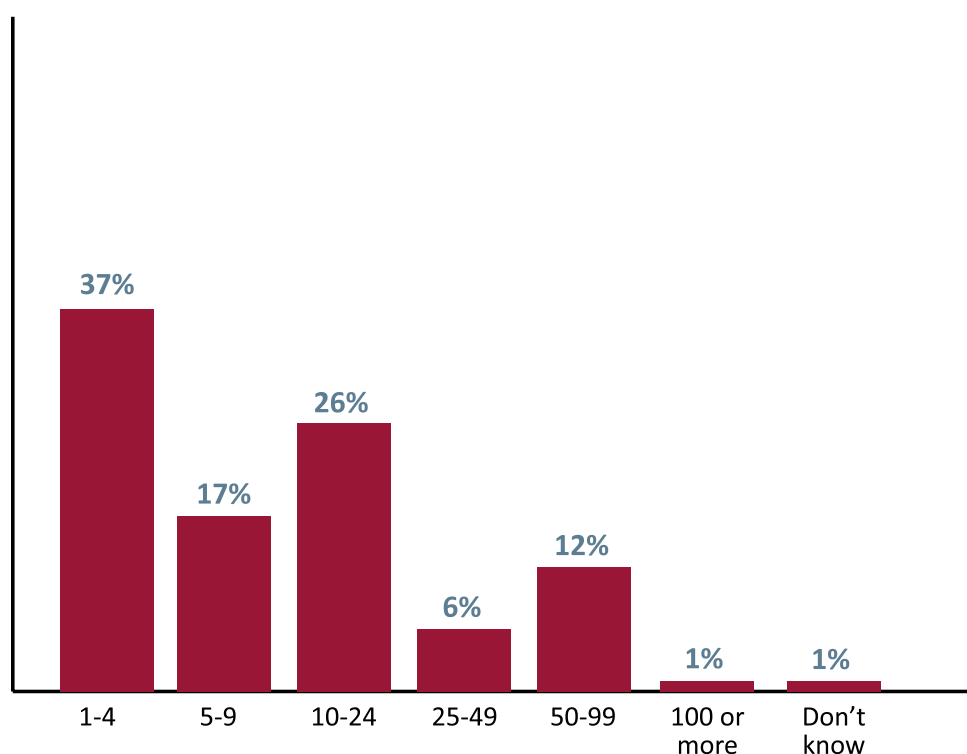
The proportion of companies saying that they retrenched staff increased three-fold from 10% at less than 60 days to 38% at more than 101 days since the start of lockdown.

Subsequently, the proportion of companies who intended retrenchments at less than 60 days (23%) contracted to just 4% at 101+ days, suggesting that these companies implemented their intended retrenchments between 61 and 100 days since the start of the lockdown.

Nearly two-in-three companies (66%) in this sample have retrenched some employees. Figure 19 shows that 37% of companies in the sample retrenched between 1 and 4 people; 17% retrenched between 5 and 9 people; and 26% retrenched between 10 and 24 jobs. Overall, 86% of businesses retrenched between 1 and 49 employees; and only 1% retrenched 100 or more employees. This is shown in Figure 19 hereafter.

Figure 19: Number of jobs lost (%)

Question: Thinking about the jobs where you no longer need as many people to work in them, how many people overall have lost their jobs? Please provide your best estimate if you do not know the exact number. (n=70)



Source: Employer skills needs survey

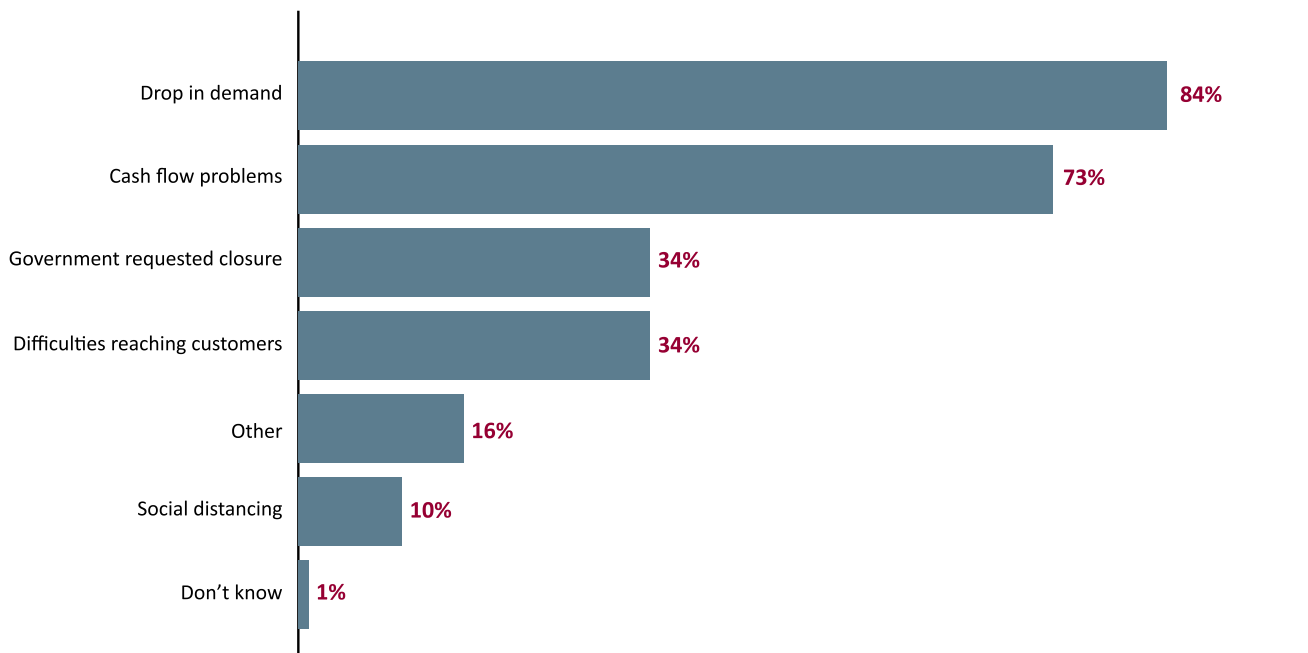
⁷⁶ See C Keulder and L Stoman

Most businesses retrenched employees because of cashflow problems (73%) and/or a drop in demand for their goods and services (84%) (see Figures 20 to 22). A further 34% listed that government requested their closure, and another 34% listed difficulties in reaching their customers as one of the reasons for retrenchments. One-in-ten (10%) listed social distancing as a reason for shedding jobs. It is important to keep in mind that businesses could list

more than reason for retrenchments, therefore, their decision to retrench is probably a combination of more than just one of the reasons presented in Figures 20 to 22 hereafter. For example, most of those who listed 'drop in demand' has also listed 'cash flow problems' as one is a direct cause of the other.

Figure 20: Main reasons for staff reductions (%)

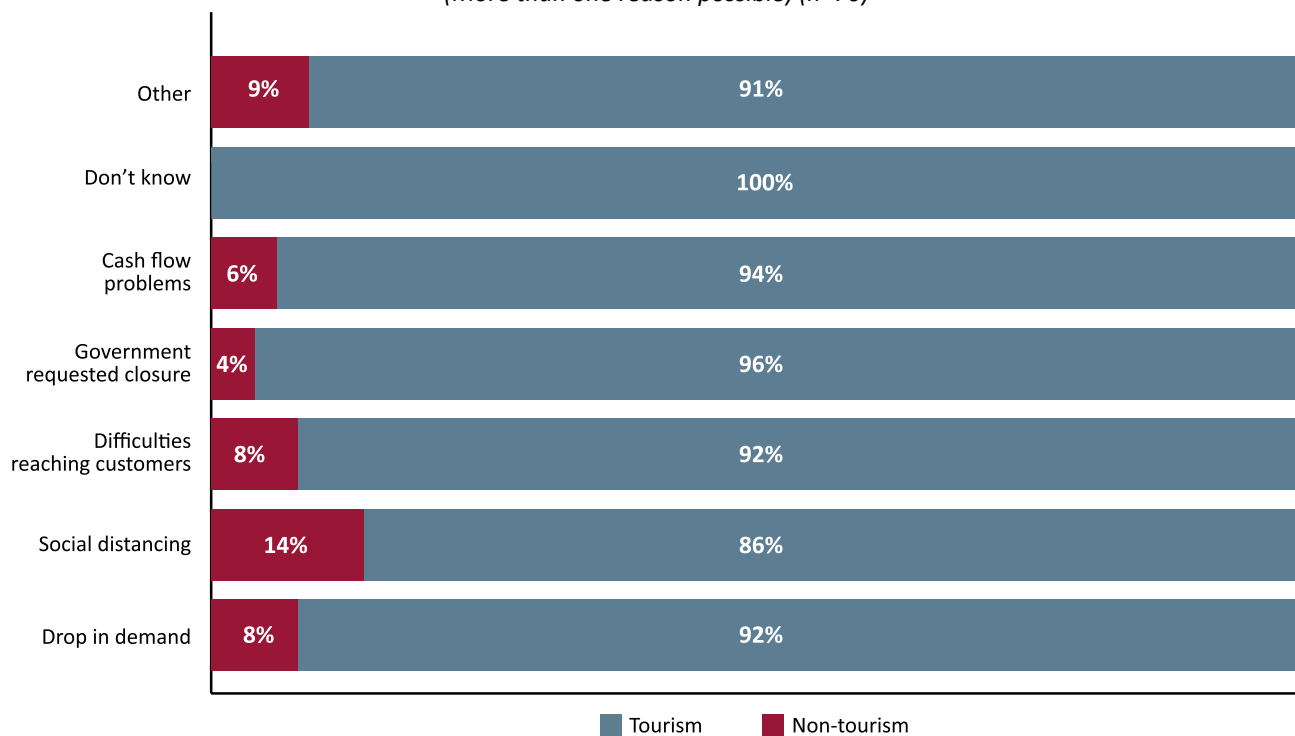
*Question: What has been the main reason for reducing the number of people in various jobs?
(More than one reason possible) (n=70)*



Source: Employer skills needs survey

Figure 21: Main reasons for staff reductions by tourism and non-tourism (%)

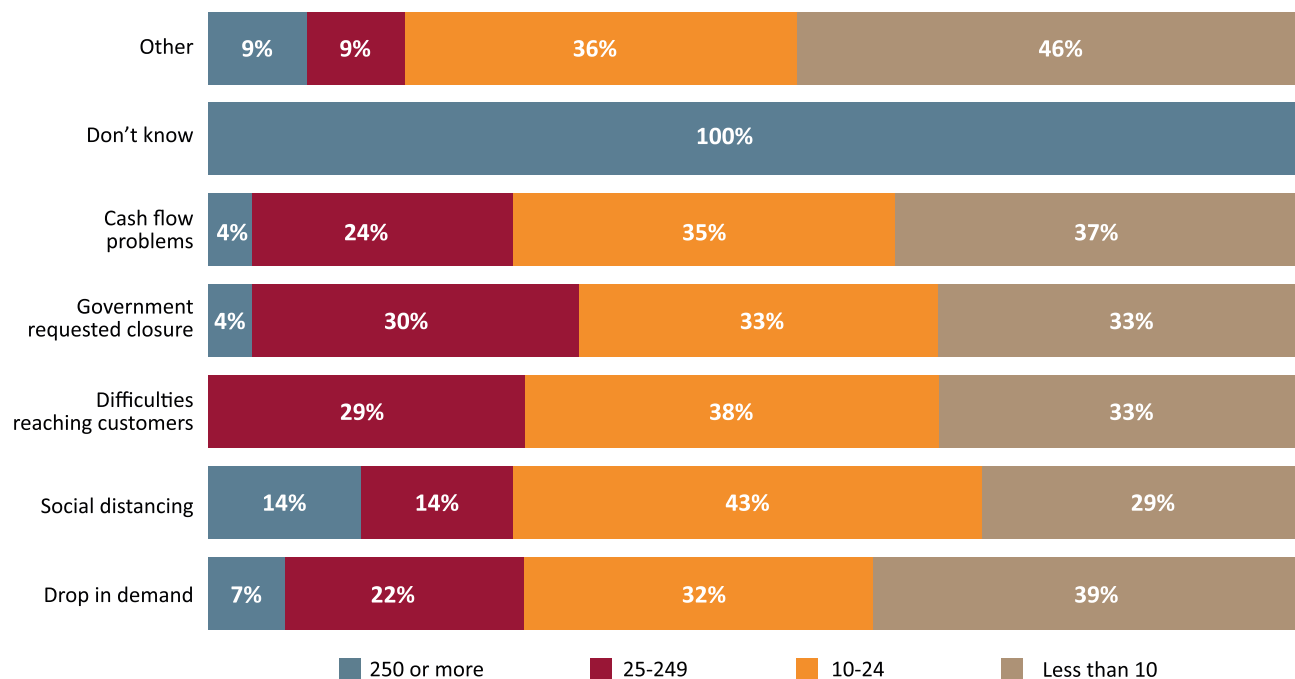
Question: What has been the main reason for reducing the number of people in various jobs?
(More than one reason possible) (n=70)



Source: Employer skills needs survey

Figure 22: Main reasons for staff reductions by company size (%)

Question: What has been the main reason for reducing the number of people in various jobs?
(More than one reason possible) (n=70)

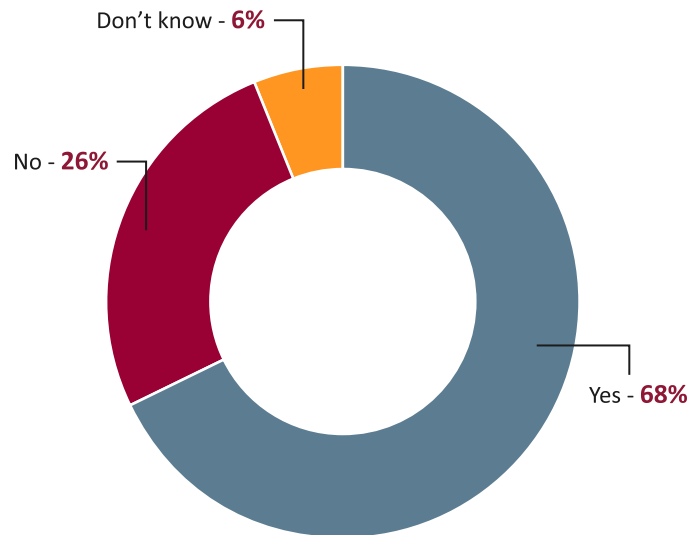


Source: Employer skills needs survey

When asked if they would need to increase the number of employees when recovery begins, 68% of businesses responded positively whilst 26% said that they would not require employing more staff, as per Figure 23 hereafter.

Figure 23: Increasing employment when recovery begins (%)

Question: When the recovery begins, will you need to increase the numbers of people employed in those jobs where employment has been reduced as a result of COVID-19? (n=70)

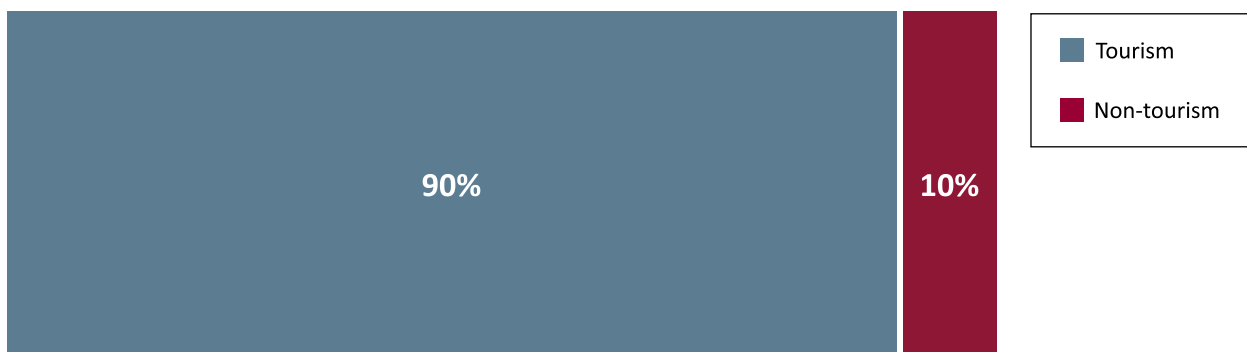


Source: Employer skills needs survey

Figure 24 hereafter shows that 90% of businesses who would increase their employment once recovery begins are from the tourism sector.

Figure 24: Increasing employment when recovery begins by tourism and non-tourism (%)

Question: When the recovery begins, will you need to increase the numbers of people employed in those jobs where employment has been reduced as a result of COVID-19? (n=70)

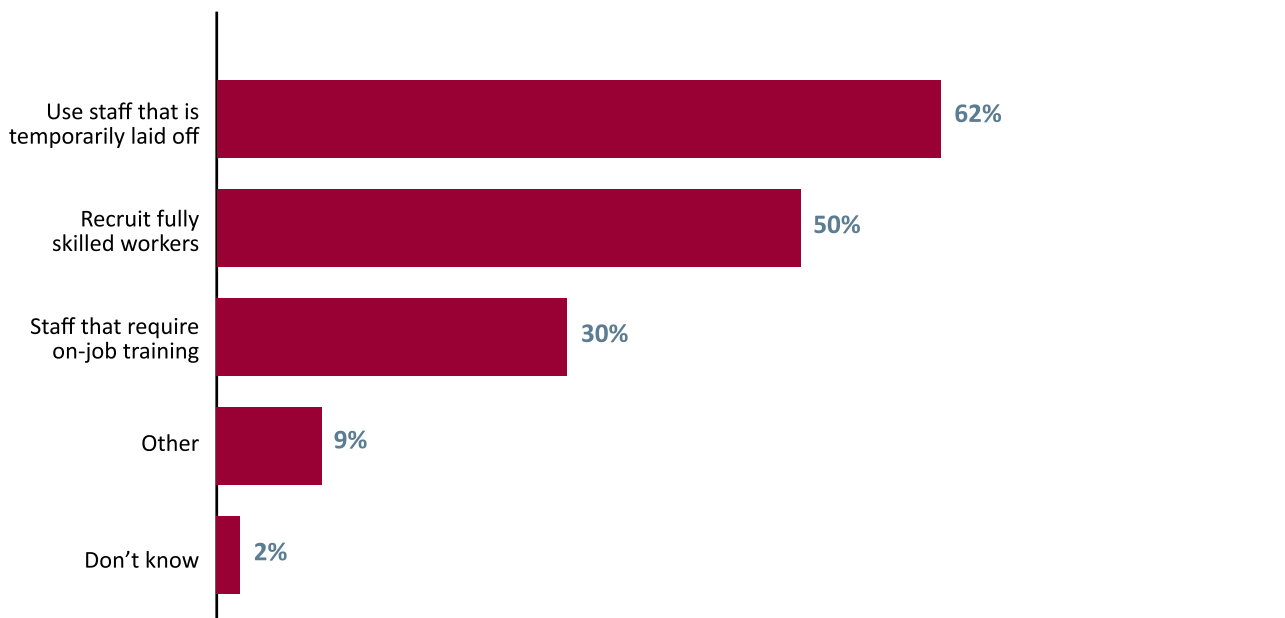


Source: Employer skills needs survey

Those who said that they would need more employees were asked how they plan to fill these new jobs. Their answers appear in Figure 25 below. Nearly two-in-every-three (62%) of businesses would opt to use furloughed staff (staff that has been temporarily laid off). Another 50% would recruit fully skilled staff and 30% would employ staff that require on-job training.

Figure 25: Methods for filling vacant jobs (%)

Question: How will you fill these jobs? (More than one response possible.) (n=47)



Source: Employer skills needs survey

Although the response rate for those to restore previously lost jobs is low (46 cases), and thus difficult to analyze meaningfully, most of the jobs listed involve lower end jobs and those jobs that were retrenched. In tourism for example such jobs include housekeeping, tour guiding, lodge staff, kitchen staff including chefs, maintenance staff and waiters.

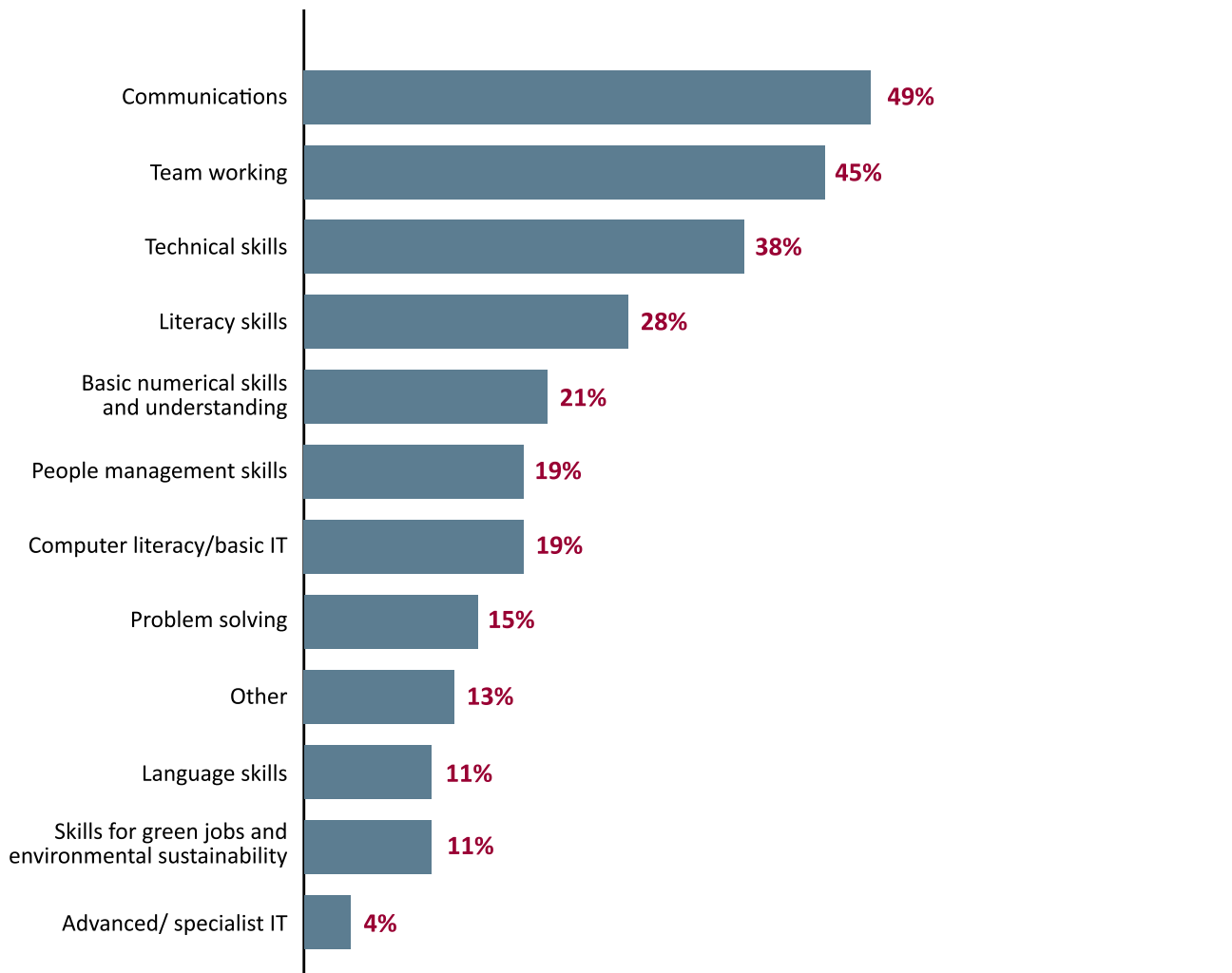
Some of the higher qualified jobs mentioned include accountants, managers and administrative staff. Seeing that most establishments would look to re-employ furloughed staff, one can only assume that the new jobs will, for most part at least, be the same as the jobs lost. There is, for example, no mention of ICT skills which perhaps suggests that, for these businesses, skills required during the recovery will be the same as the skills employed prior to the pandemic.

This is largely confirmed with the relatively low position of IT skills among the key skills and qualities for recruits presented in Figure 26 hereafter.

Figure 26 lists the key skills and qualities businesses would look at when recruiting staff during the recovery. Given the changes to work arrangements during especially the early stages of the pandemic that forced many employees to work from home and for many to work on-line using unfamiliar technology, one can perhaps understand that communication (49%) and teamwork (45%) lists as the most desirable skills and qualities for new recruits. Technical (38%), literacy skills (28%) and basic numerical skills (21%) are traditionally in high demand and represents a continuation of skill in demand from before the pandemic, and so is people management and IT skills at 19% respectively.

Figure 26: Key skills and qualities for new recruits (%)

Question: What are the key skills and qualities you will be looking for from people to fill these jobs?
(More than one response possible.) (n=47)



Source: Employer skills needs survey

Figure 27 hereafter shows the same by tourism and non-tourism sectors. Communications, teamwork, language skills and more complex numerical and statistical skills are considered more important by businesses in the tourism sector.

Figure 27: Key skills and qualities for new recruits by tourism and non-tourism (%)

Question: What are the key skills and qualities you will be looking for from people to fill these jobs? (More than one response possible.) (n=47)

	Tourism	Non-tourism	Overall
Communications	96%	4%	49%
Team working	95%	5%	45%
Technical skills	83%	17%	38%
Literacy skills	85%	15%	28%
Basic numerical skills and understanding	90%	10%	21%
People management skills	89%	11%	19%
Computer literacy/ basic IT	78%	22%	19%
Problem solving	86%	14%	15%
Other	100%	-	13%
Language skills	100%	-	11%
Skills for green jobs and environment sustainability	80%	20%	11%
Advanced/specialist IT	50%	50%	4%
More complex numerical or statistical skills	100%	-	2%

Source: Employer skills needs survey

What is perhaps more surprising is the low demand for new, more modern skills, i.e., skills such as skills for green jobs and environmental sustainability (11%), advanced and specialist ITC skills (4%) and complex numerical or statistical skills (2%).

The need for such skills is discussed elsewhere in this report and is important as they are key components of new directives for more

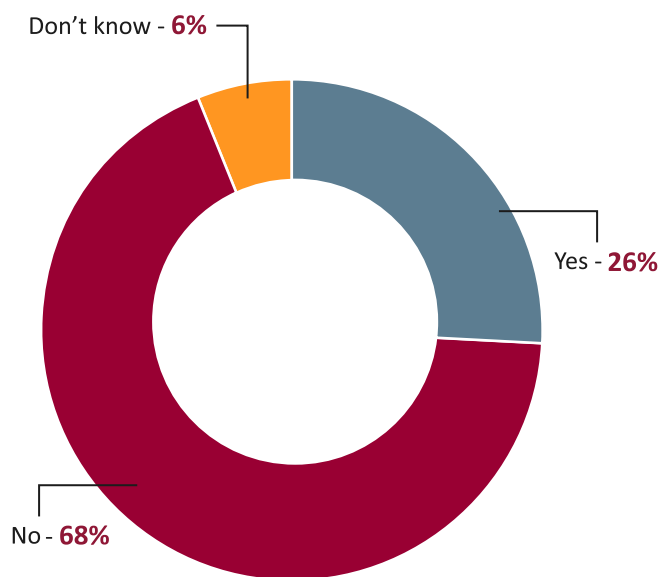
sustainability and more environmentally friendly business and developmental solutions for the post-COVID-19 world. Advanced numerical and statistical skills are crucial for contemporary business solutions based on big data.

It is possible from the skill requirements to deduce that Namibian businesses are looking to continue with their traditional business models during the recovery rather than to more progressive business models. This would imply that the demand for new skills would be low and nowhere near the demand for the skills traditionally associated with the business and sector.

It is thus not surprising that 68% of businesses in the sample proclaim that they do not foresee any difficulty in filling future vacancies (*see Figure 28 hereafter*).

Figure 28: Perceived difficulty in filling future jobs (%)

Question: Thinking about the jobs you will recruit for, do you think you will have jobs hard-to-fill positions? (n=47)



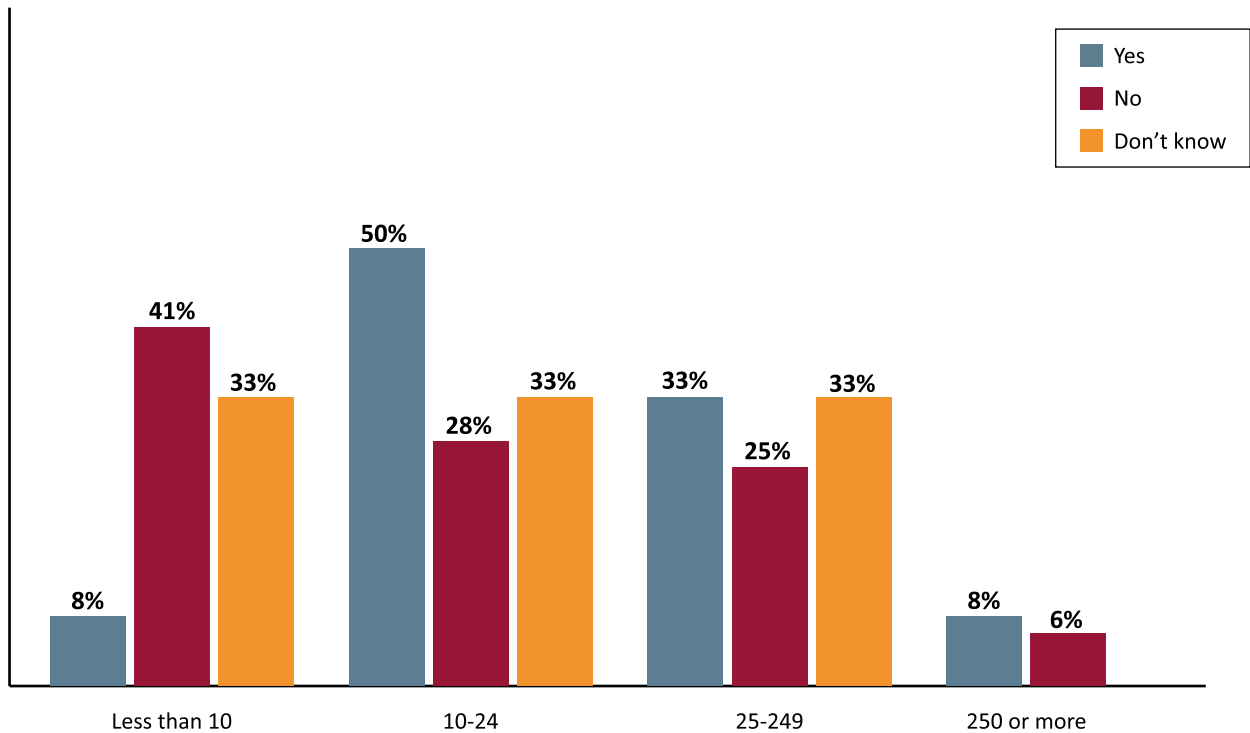
Source: Employer skills needs survey



Figure 29 hereafter shows the perceived difficulty of filling future jobs by company size.

Figure 29: Perceived difficulty in filling future jobs by company size (%)

Question: Thinking about the jobs you will recruit to, do you think you will have jobs hard-to-fill? (n=47)



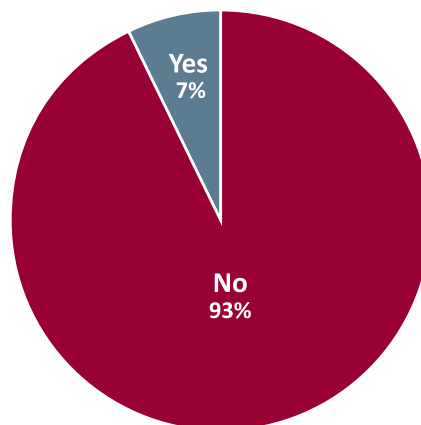
Source: Employer skills needs survey

6.6 Job gains during COVID-19 crisis

Only 7% of the businesses in the sample reported job growth during the pandemic (See Figure 30). From this it is evident that very few of the businesses in the sample were able to grow or expand their businesses during the pandemic.

Figure 30: Increases in jobs during the COVID-19 crisis? (%)

Question: Since the COVID-19 crisis have there been any jobs where you have increased the number of people employed? (n=106)



Source: Employer skills needs survey

With this small sample of companies that experienced employment-based growth, it is difficult to extract meaningful analysis on what jobs grew or why these jobs grew. The distribution of the limited number of responses suggests that there is no systemic pattern or “class of jobs” which point to a new approach or model for these businesses.

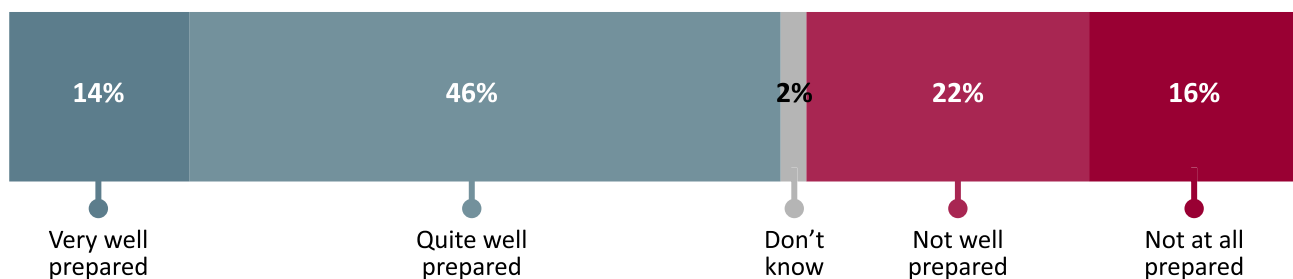
One company mentioned the manufacturing of PPE material during the pandemic as a reason for new employment, whilst others mention the need to deliver products to clients during lockdown. These are more likely to be responses to the immediate problem at hand, rather than a long-term shift in business operations.

6.7 Existing employees

According to Figure 31 below, 60% of the businesses in the sample thought their employees were well prepared for the changes in their working environment during the COVID-19 crisis. Nearly half (46%) were ‘quite well prepared’ whilst 14% were ‘very well prepared’. Overall, 38% reported employees not being well prepared to deal with changes in their working arrangements.

Figure 31: Employees preparedness for changes in working arrangements during crisis (%)

Question: Generally speaking, how well prepared were employees to deal with the change which affected how they have had to work during the crisis? (n=105)



Source: Employer skills needs survey

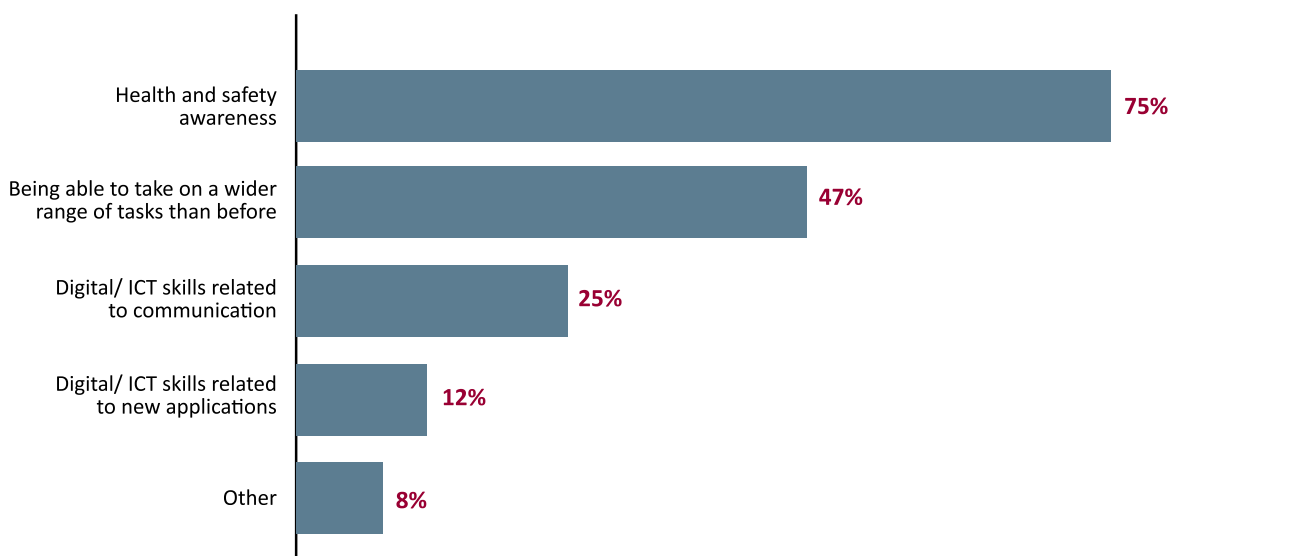


When asked what the main areas were in which employees had to improve their skills to be able to work during the crisis, most businesses (75%) mentioned 'health and safety awareness'. Nearly half of businesses in the sample (47%) mentioned that their employees had to adapt to be able to take on a wider range of tasks than before. It is common in companies that reduced staff for remaining staff members to step up and perform a much broader range of tasks and duties.

Staff in one quarter (25%) of businesses in the sample had to adjust their ITC skills to be able to communicate better using new digital technology necessitated by social distancing measures. Another 12% had to learn to use new digital/ICT applications (see **Figure 32 below**).

Figure 32: New areas of skills improvement due to covid-19 (%)

Question: What have been the main areas where employees have had to improve their skills in order to do their jobs during the current crisis? (More than one response possible.) (n=105)



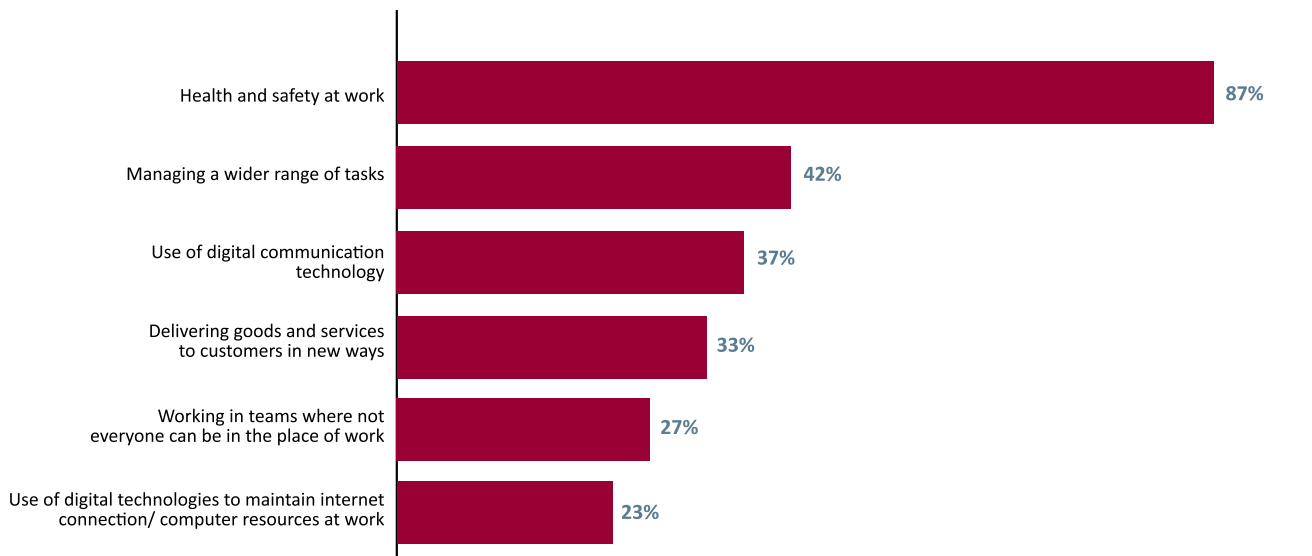
Source: Employer skills needs survey

Nearly three-quarters of businesses (74%) provided training to employees to deal with the new working arrangements. Most businesses in the sample (83%) provided training focusing on health and safety at work; 42% provided training on how to manage a wider range of tasks than before, 37% provided training in the use of digital communication platforms; and 33% provided training on new ways to deliver goods and services to customers.

Less than one-in-four (23%) provided training in using digital technologies to maintain internet connections and assessing computer resources; and 27% provided training on working as teams from remote locations (**Figure 33**).

Figure 33: Training contents (%)

Question: What training did you need to provide? (More than one response possible.)



Source: Employer skills needs survey

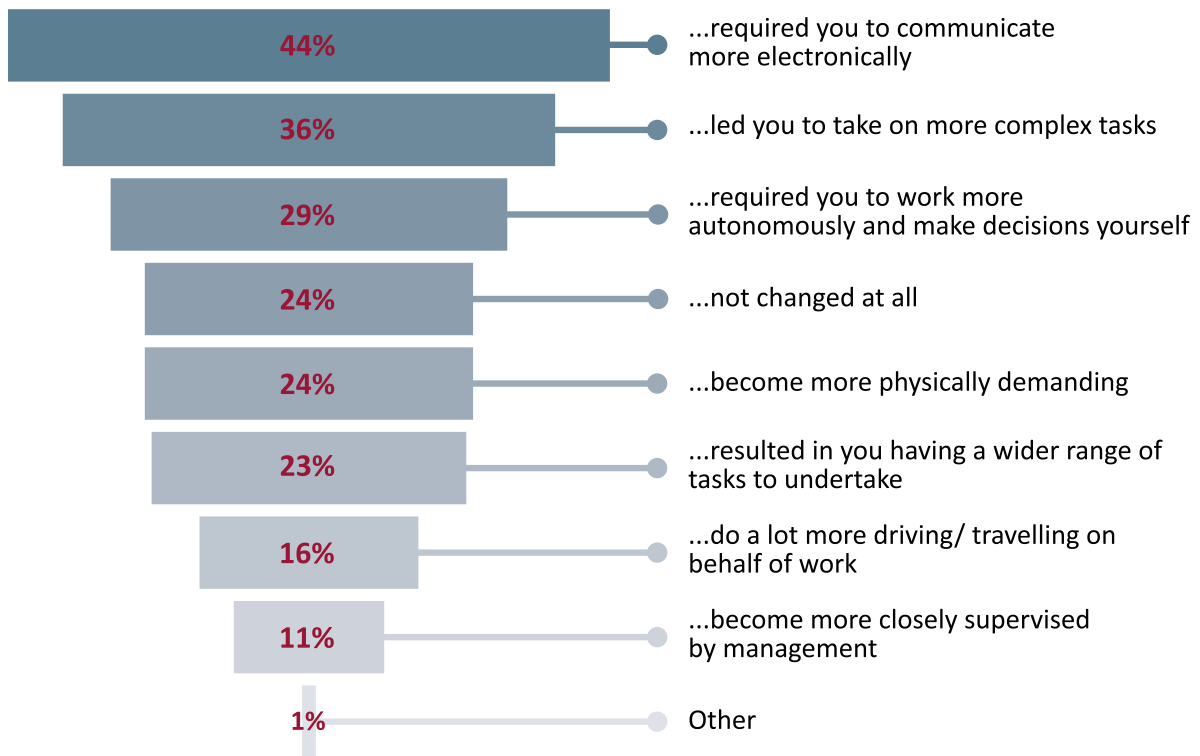
Among individuals nearly all report changes in their job responsibilities as a result of the pandemic. Figure 34 hereafter summarizes these changes.

Half (50%) who are in employment reported that they have been more closely supervised by their management. One-in-three (33%) reported having to take on a wider range of tasks whilst 28% had to do more driving and traveling for work. The same proportion report having to do more electronic communication and slightly more than one quarter (26%) report having to do more complex tasks.

It is probable that at least these findings reflect the changes necessitated by retrenchments and even reduced work hours, which meant that workers had to assume the tasks and duties of those who were retrenched or furloughed or on reduced hours. This highlights the need for a multiskilled workforce, especially during the time of the pandemic. The second feature that may well become a future part of all jobs is the ability to communicate using digital and electronic platforms. Most employed individuals in the sample indicated that they had to communicate more in this manner, either with colleagues (74%) or with clients and/or suppliers (71%).

Figure 34: Changes in job responsibilities (%)

Question: Since the onset of the COVID-19 crisis has your job... (More than one response possible) (n=90)



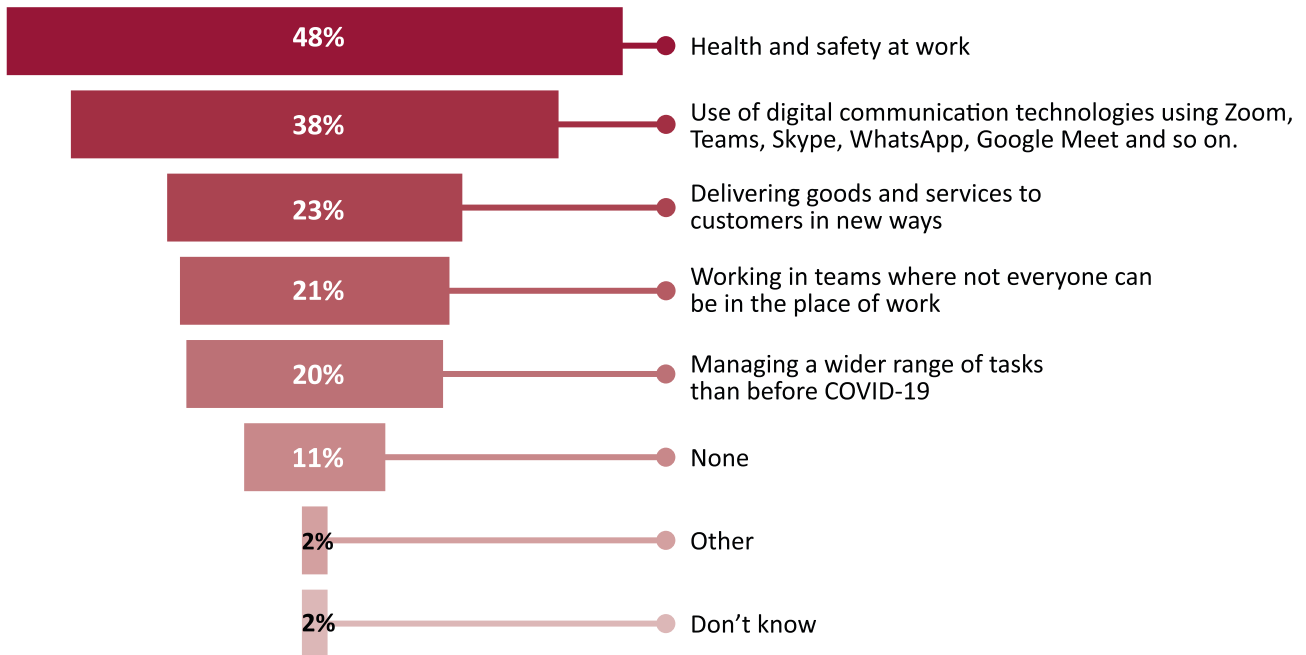
Source: Individual skills needs survey

Just more than one-in-every three employed individuals reported that they have all the skills needed to do their jobs during the COVID-19 crisis. Of these, 90% were male, and 10% female employees. Less than one-in-ten have none of the skills needed, and one-in-three falls into the bottom half of the scale of skills needed for the COVID crisis.

Figure 35 identifies the areas in which employed individuals feel they would require additional skills. The majority (48%) would need more health and safety at work training; just more than one-in-three (35%) require training in the use of digital communications platforms such as MS Teams, Zoom, Skype and so forth.

Figure 35: Areas for skills improvement during COVID-19 crisis (%)

Question: Are there areas where you think your skills need improving so that you can do your job better during the COVID crisis? (More than one response possible.) (n=90)

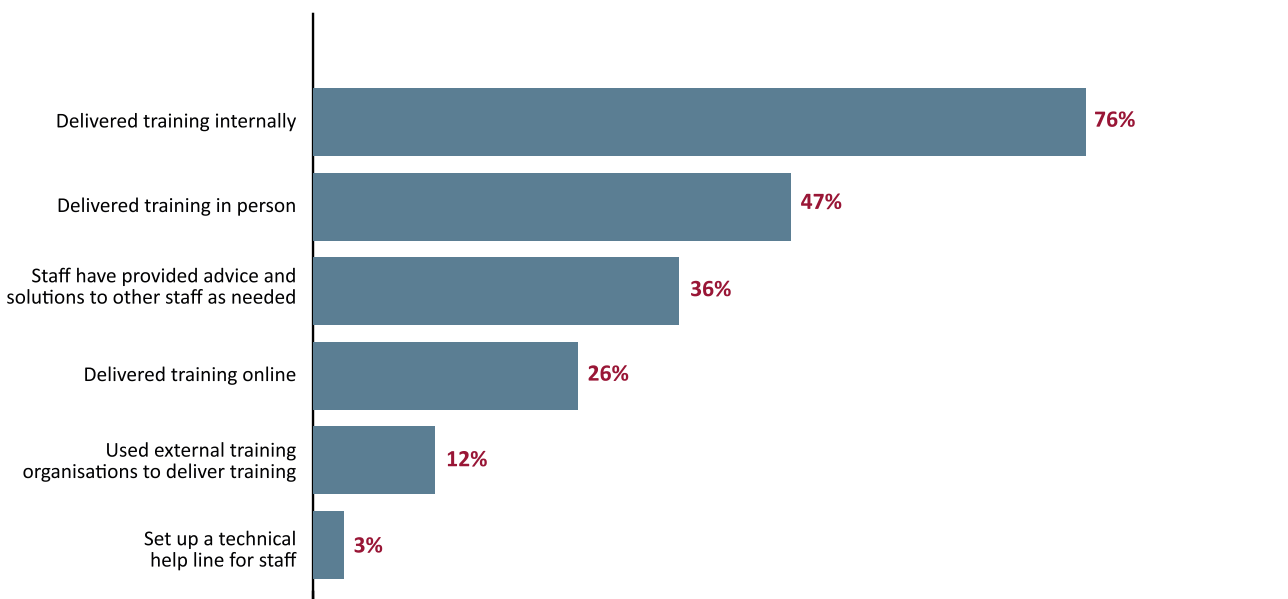


Source: Individual skills needs survey

Nearly half the companies in the sample did the training internally, and 47% delivered it in person. In 36% of the businesses in the sample staff assisted fellow staff members and 3% set up a help line for staff members. Only 26% delivered training online and 12% used external organizations to do staff training (See Figure 36).

Figure 36: Methods used for training (%)

Question: How did you provide the training? (More than one response possible.) (n=78)



Source: Employer skills needs survey

Figure 37: Methods used for training by company size (%)

Question: How did you provide the training? (More than one response possible.) (n=78)

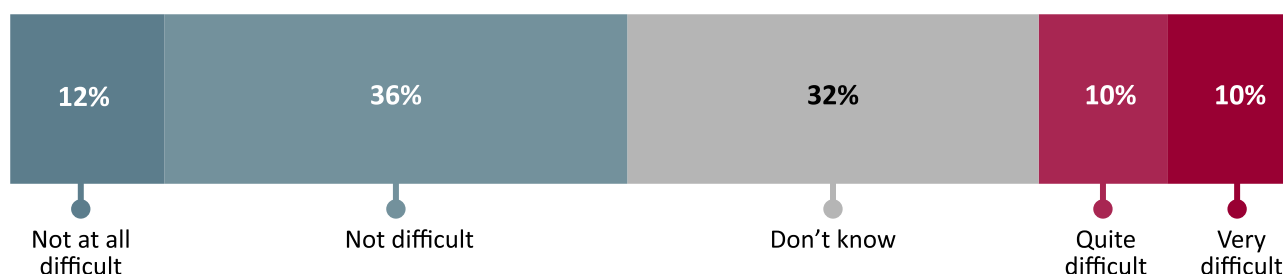
	Staff have provided advice and solutions to other staff as needed	Set up a technical help line for staff	Delivered training in person	Delivered training online	Delivered training internally	Used external training organisations to deliver training
Less than 10	29%	-	46%	25%	32%	33%
10-24	39%	-	38%	10%	32%	11%
25-249	21%	50%	16%	40%	29%	45%
250 or more	11%	50%	-	25%	7%	11%

Source: Employer skills needs survey

Only 20% of businesses in the sample reported that training was difficult whilst 48% reported that it was not difficult. An unusually high number 32% of respondents did not know whether it was difficult or not perhaps because they may not have been personally involved in the process themselves (Figure 38).

Figure 38: Difficulty in providing the training (%)

Question: Generally speaking, how easy has it been to provide training to staff in order that they might work from home? (n=78)



Source: Employer skills needs survey

Only about 35% of individuals in the sample undertook health and safety training related to the pandemic. Nearly all received training on the use of PPE, and a majority received training on social distancing at work, rules for handwashing, coughs and sneezes, protection of customers and suppliers as well as disinfection of the workplace and rules for meetings. Nearly all regard themselves as well or very well informed about protecting themselves and fellow workers from COVID-19 whilst at work.

In addition to health and safety training, 41% of the employed individuals in the sample received training to ensure they have the skills to do their job during the COVID-19 crisis.

Half did not receive any additional training but would have liked some and the remainder felt that they did not need any additional training. Because of the very small number of employed individuals who did receive training, it is not possible to report on the training data with confidence in its reliability. The following qualitative trends can be reported.

- A majority received job-specific or occupation specific technical training.
- A significant number received training in using new equipment.
- A significant number received training in the use of communications platforms; and nearly the same number received training in the use of digital technologies and such related tasks.
- When asked what skills they would have liked to receive, individuals more or less identified the same three types of skills and assigned the same priorities as the training they already received (*see the first three bullet points*).
- Similar skills were prioritized when asked which skills they need improving to ensure that they'd be able to keep their jobs after the current crisis.
- Approximately one-in-three indicated that they have received training that will help them to keep their jobs after the current crisis. Nearly half indicated that they did not, but that they would have liked some. They rest felt more training was not necessary.



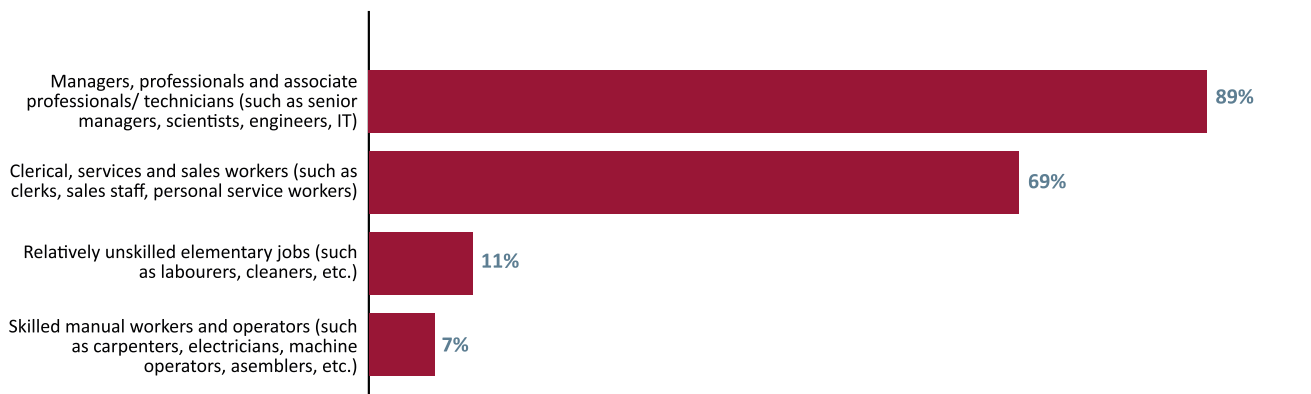
Since the start of the pandemic, employees in 44% of the enterprises in the sample had to work from home and in 56% of cases they did not have to. Of the 44% cases that had to work from home, only 8% had to do so all the time.

in higher positions (managers, professionals, and technicians) are much more likely to have worked from home than those in un- or lower skilled positions (11%) and those who are skilled manual workers and operators (7%).

Figure 39 shows a clear pattern to remototing working arrangements. Those in jobs that perform mainly clerical and administrative work (69%), and those

Figure 39: Employees working from home (%)

Question: Which workers have been working from home? (More than one response possible) (n=45)



Source: Employer skills needs survey



6.8 Government aid to businesses

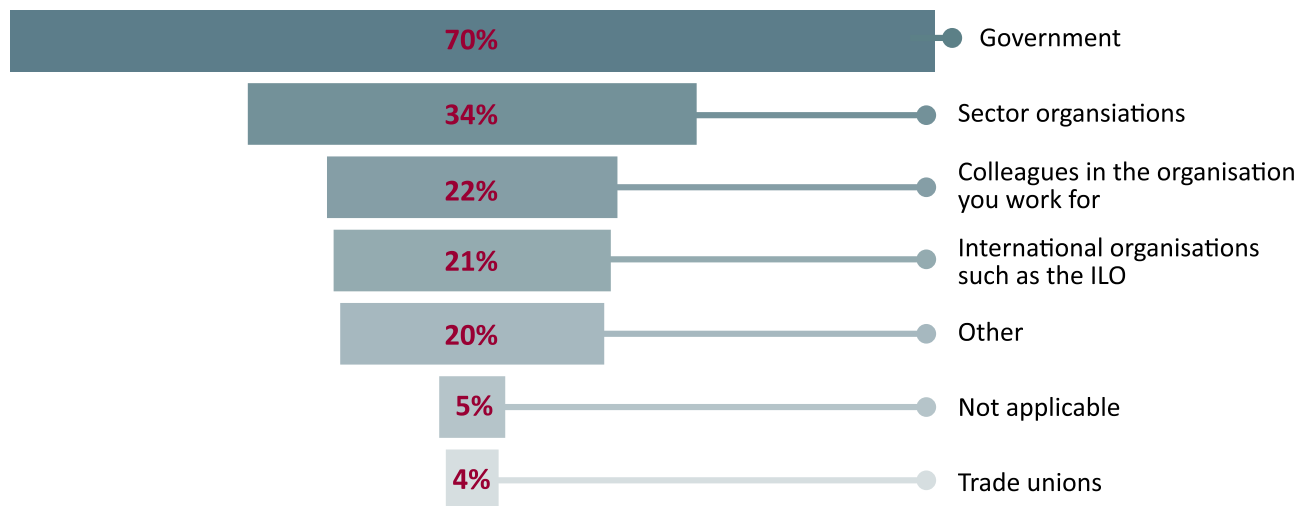
The Namibian government established a COVID-19 Communication Centre on 2 April 2020 shortly after the proclamation of the first hard lockdown. This established a platform for twice daily press conferences, media questions and sectoral representatives to engage with the Namibian public on all matters COVID-19 related.

Figure 40 shows that this initiative was successful to the effect that 70% of businesses in the sample cited government as their main source of information about the pandemic.

A further 34% considered sectoral organizations as their main source and 22% considered their colleagues to be their main source. For 21% the main sources were international organizations and 20% listed other sources. For 4% trade unions were the main source.

Figure 40: Main sources of information (%)

*Question: What are your main sources of information on COVID-19 and how businesses can respond?
More than one response possible. (n=103)*



Source: Employer skills needs survey

Less than one-in-five businesses in the sample (16%) received financial assistance from government whilst 81% said that they received no assistance from government. The remaining did not know. In a previous survey, the Survey Warehouse study of 2020, only a third of business in the sample reported receiving financial assistance, of which was mainly from landlords, (17%), commercial banks (15%) and suppliers (10%).

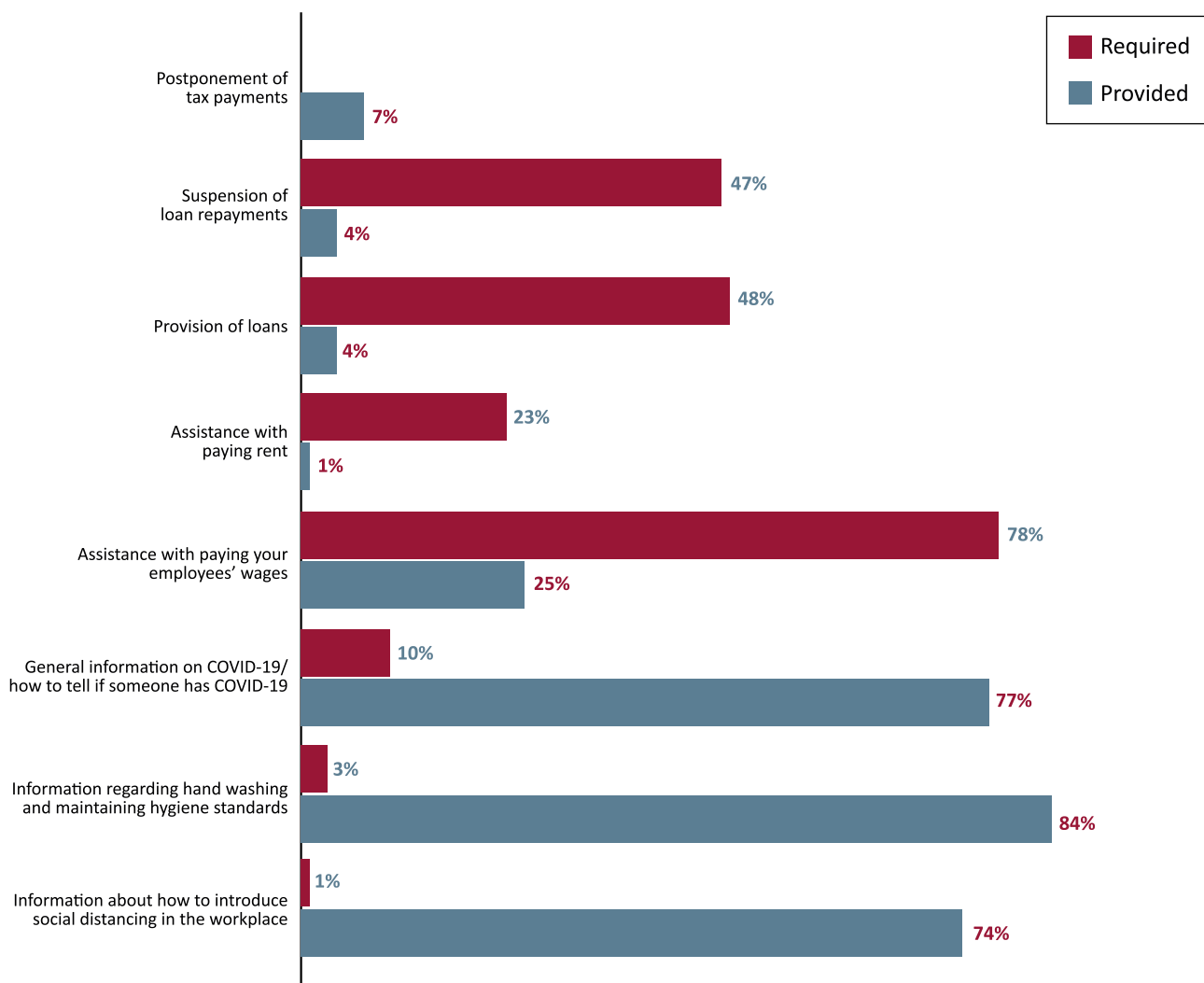
Figure 41 shows that most businesses in the sample received non-monetary assistance from government. This assistance was mainly through the provision of information: general information about COVID-19 (77%), information about handwashing and hygiene standards (84%) and information about introducing social distancing in the workplace (74%).

Financial assistance from government was minimal: 7% benefitted from the postponement of taxes; 4% benefitted from the suspension of loan repayments; 4% benefitted from the provision of loans and 1% benefitted from assistance with paying rent.

When asked about the types of assistance they require, the balance between information and financial assistance switched. In Figure 37 businesses in the sample believe they require much more financial assistance and do not require much more information. Most (78%) say that they require assistance with paying wages; almost half (48%) require loans; about the same proportion (47%) require suspension with loan repayments; and 23% require assistance with paying rent.

Figure 41: Assistance from government received and required (%)

Question: What information or assistance has it received from government? What are the three most important types of further help do you require? (More than one response possible) (n=104)



Source: Employer skills needs survey

Only 39% of individuals report to have received any information about working during the crisis. The information shortage is highest among the unemployed, the self-employed and individuals working with no pay in their family business. This suggests that most individuals received information at their place of work and that information campaigns struggled to reach those without formal places of work or those employed in the informal sector. Most received information from either the national or local government.

Only 28% of the individuals in the sample had received financial assistance since the beginning of the COVID-19 pandemic and by far the majority received their assistance from the national government mainly in the form of information. Some received assistance from their local government and the SSC (unemployment insurance). Some benefitted from contributions made by family members. Overall, many individuals in the sample did not receive financial assistance of any kind during the pandemic.

6.9 Unemployed workers

In previous sections evidence presented showed that thousands of Namibians lost their jobs just this past year. These job losses have been attributed to both the country's pre-COVID-19 recession and the economic fall-out from the pandemic.

More than half (58%) of unemployed individuals have been unemployed for two years or less. Almost four-in-five (77%) have been unemployed for three years or less. Many respondents in the sample's unemployment status, therefore, predates the current pandemic. Only 29% of individuals in the sample has been unemployed for one year or less.

Some 56% were previously employed as technicians or associate professionals whose main tasks require experience and knowledge to assist in supporting professionals or managers, and nearly one-in-five (18%) worked as clerical support staff.

Most worked in the mining and quarrying sector (17%) or in construction (26%) or in administrative and support service activities (9%).

Nearly one-in-three (30%) were laid off due to COVID-19 whilst 54% left because their fixed contracts came to an end. It is likely that these

Data from various sources presented indicate that the impact of the stimulus has not been sufficient to prevent more business closure and further job losses. There may well be more deprivation to come as payment-holidays and suspension of loan repayments come to an end over the next months and many businesses in sectors like tourism are unable to return to full capacity. More retrenchment would have a devastating impact on households and consumers are already under pressure because of the measures implemented during the first year of the pandemic. To compound an already precarious situation even more, with international shortages of vaccines, Namibia may well experience one or more infection peaks before this year is over. The economic impact of these future waves may be very harmful for business and economic recovery.

individuals lost their jobs as a result of the sluggish state of the construction sector caused by the pre-COVID-19 recession. Two-in-three unemployed individuals did not undergo training during the period of their unemployment. Most of training was not directly related to COVID-19 and most of the training was provided by a TVET facility or training centre meaning the training was of a technical nature.

Almost a third (31%) of unemployed individuals applied for jobs directly related to responding to COVID-19 and 23% did voluntary work. With only a very small number of individuals applying for COVID-19 related jobs or doing volunteer work, the number of cases is too small for further analysis. It thus appears as if the pandemic did not create many employment opportunities for paid or volunteer work, or that the unemployed individuals in the sample did not look for or find such opportunities. Those who did undertake volunteer work did generally feel that their skills were a match to these jobs and felt that they will benefit from it in future jobs.

6.10 The future

Figure 42 presents business perceptions on a possible time frame for employment recovery from the impact of the COVID-19 pandemic. From the data it is clear that the majority of the businesses felt the recovery will be slow and that employment levels will not reach pre-COVID levels within the next 12 months. Many expect employment levels to decrease further over the next six-to-twelve-month period. There is also significant uncertainty.

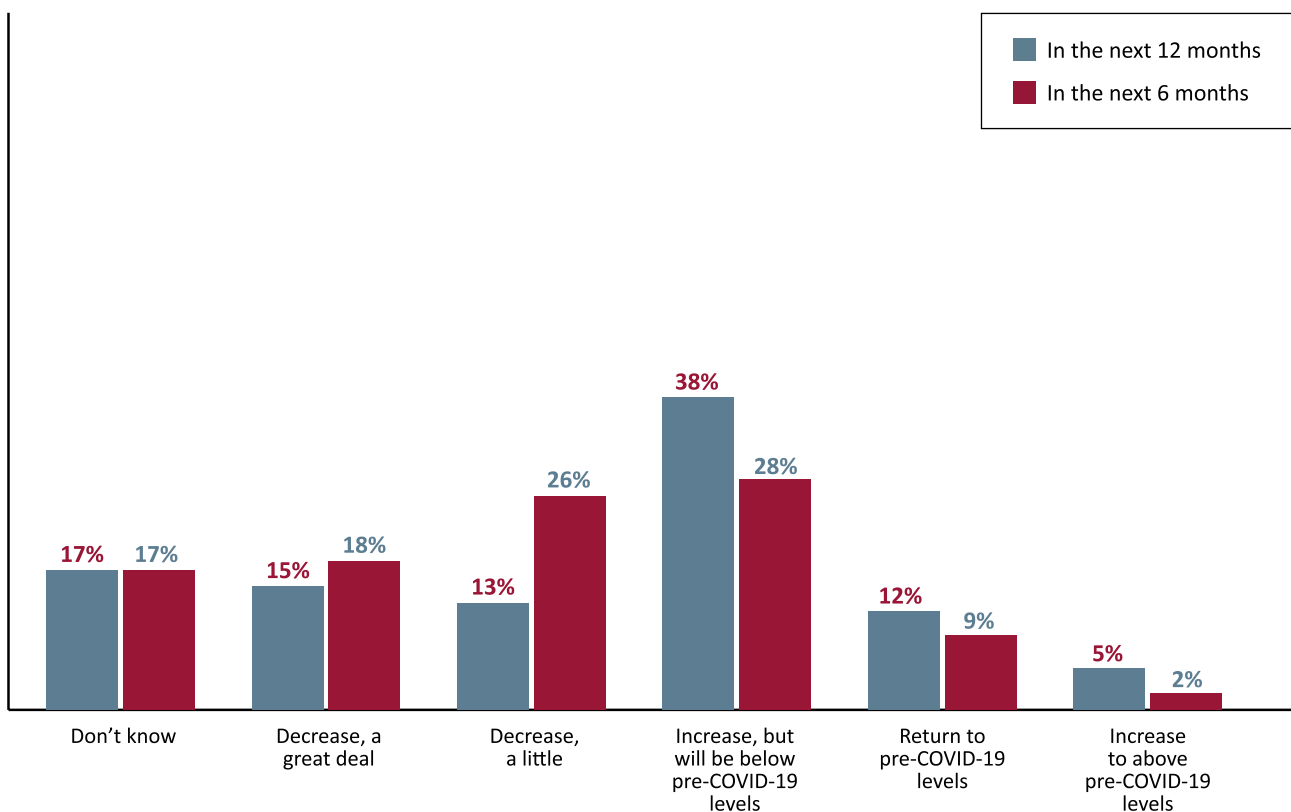
Only 2% felt that employment will increase beyond pre-COVID 19 levels within the next six months, whilst slightly more (5%) felt it will do so within the next 12 months. Less than one-in-ten businesses (9%) expect employment to return to pre-COVID levels within the next six months whilst 12% felt it will return within the next 12 months.

Overall, 28% expect employment to decrease – either a little or a great deal - over the next 12 months, whereas 44% expect it to decrease over the next six months. Slightly less than one-in-five (17%) did not know what direction employment will go, either over the next 6 or 12 months. Nearly three-quarters (74%) were working for an employer prior to losing their jobs.

Close to three-in-ten (28%) felt that employment will increase but remain below pre-COVID levels within the next 6 months, whilst 39% expected it to grow but remain below normal over the next 12 months.

Figure 42: Future employment expectations (%)

Question: Thinking about the next 6 months, do you expect employment to...; And thinking about the next 12 months, do you expect employment to... (n=104)



Source: Employer skills needs survey

More than four-in-five (81%) individuals reported that they expect to continue to work for their current employer in six months' time. Most expect that it would be either very difficult (56%) or difficult (23%) to find another job if they were to lose their jobs anytime during the next six months. They also expect to either find the 'same job at the same rate of pay' (33%) or a different job at the same or higher rate of pay (43%). More than half (55%) said that they do not require reskilling for finding a new job and less than half (47%) said they would like to be retrained. Although the sample is extremely small, 'technical skills for the specific job' was most frequently mentioned. Most cited a TVET college or training centre as the most likely source for the training. A few respondents also mentioned employers as a possible source for training. Near all respondents felt that it is 'very' or 'quite likely' that they will be able to do the training.

Slightly less than half (44%) of unemployed individuals felt that it is likely that they will be employed in six months' time. Only about one-in-four (25%) felt that this is 'very likely' to be the case whereas 31% reported that they did not know. There is thus significant uncertainty among the unemployed about future employment. Most

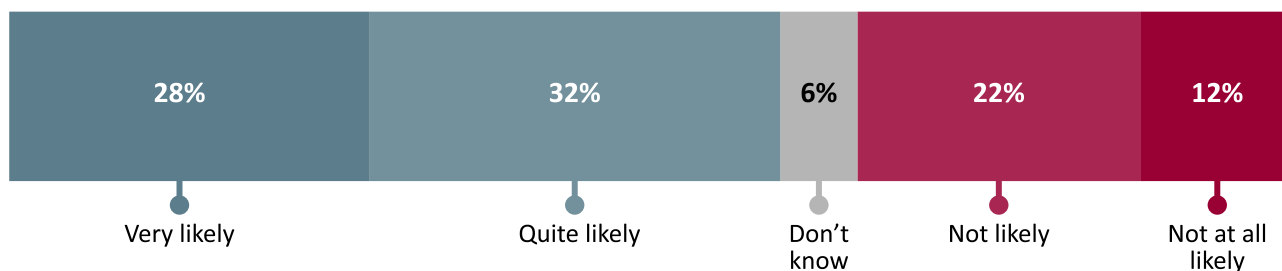
(51%) felt that they would return to the same job as what they held before, whilst 17% did not know what type of job they will return to. Some 53% felt retraining will be needed for them to find a new job, and 67% felt that they would like to be retrained. The same two skill sets that were identified before prevails once more: most want the technical skills required for their type of job, whilst a significant proportion want skills related to administration and customer relations. Demand for digital and green skills are low.

When asked whether or not any COVID-related issues might provide opportunities for their businesses, two-in-three (66%) of businesses answered 'no'. Only 17% responded positively whilst 16% were uncertain and 'did not know'.

When asked whether or not their businesses will implement steps to build future competitiveness or resilience to be able to bounce back or withstand future crises, 34% of answered that it was either 'not likely' (12%) or 'not at all likely' (22%). Overall, 60% of businesses indicated that it is either 'very likely' (28%) or 'quite likely' (32%) that steps toward greater competitiveness or resilience will be implemented. **See figure 43 hereafter.**

Figure 43: Likelihood of future measures to build resilience (%)

Question: Over the short term, is it likely that this establishment will take measures explicitly aimed at building future competitiveness or resilience to future pandemics and other major crises? By resilience is meant your ability to withstand or quickly bounce back from any future crisis. (n=103)

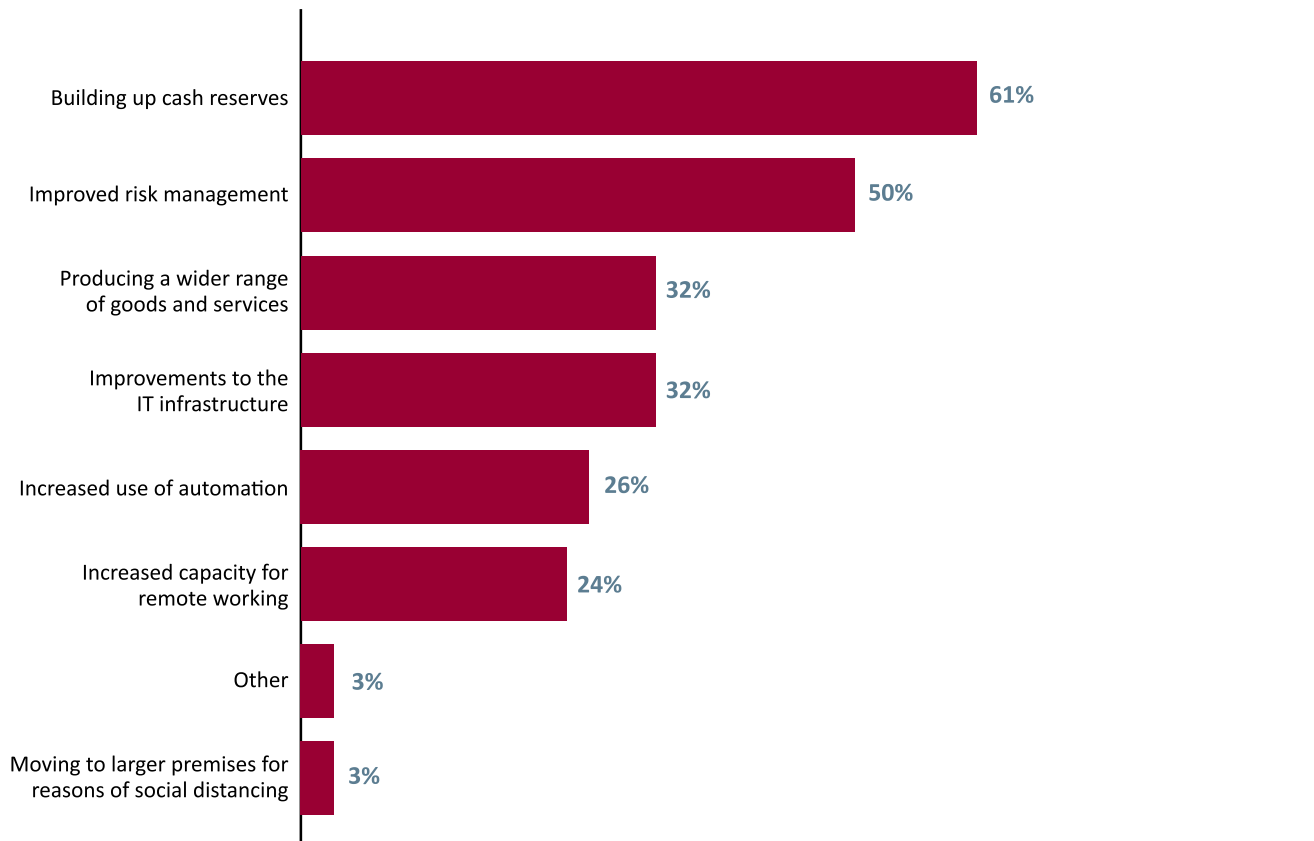


Source: Employer skills needs survey

Figure 44 shows that the most preferred strategy for improving resilience is stockpiling cash (61%) and improved risk management (50%). Other companies are considering producing a wider range of goods and services (32%) or making improvements to their IT (32%). Increased automation and increased capacity for working remotely would be options for 26% and 24% roughly.

Figure 44: Improved resilience measures (%)

Question: What are the three most measures this is likely to include? (Up to three responses possible). (n=62)



Source: Employer skills needs survey

Figure 45 hereafter shows that the need for a bigger facility to accommodate social distancing is especially important for smaller establishments, and so is producing a wider range of products. For those businesses who employ 250 or more employees, the need to build up cash reserves is less than for establishments who employ fewer than 250 employees.

Improved IT infrastructure is also more important for those businesses that employ 25 or more employees, whereas increased automations seem to be more important for those who employ 25 to 249 employees.

Figure 45: Improved resilience measures by company size (%)

Question: What are the three most measures this is likely to include? (Up to three responses possible). (n=62)

	Other	Improved risk management	Building up cash reserves	Moving to larger premises for social distancing	Producing wider range of goods and services	Increased capacity for remote working	Improvements to IT	Increased automation
Less than 10	-	26%	29%	100%	50%	19%	15%	19%
10-24	50%	32%	37%	-	35%	27%	15%	24%
25-249	50%	32%	31%	-	15%	27%	40%	38%
250 or more	-	10%	3%	-	-	27%	30 %	19%

Source: Employer skills needs survey

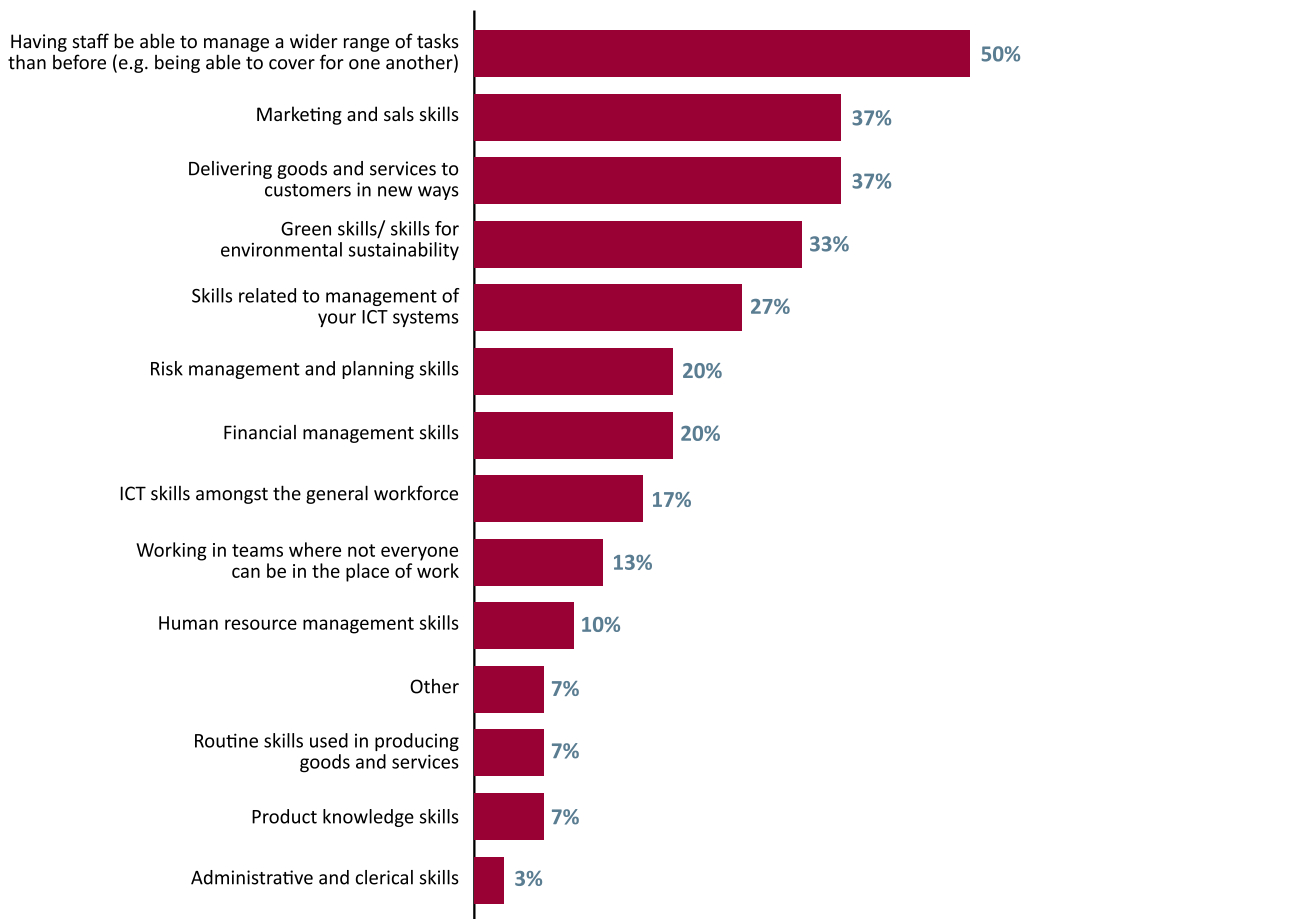


Some 48% of businesses in the sample felt that future changes to their businesses will affect demand for skills whilst almost the same proportion (44%) felt that there will not be changes to the demand for skills. The remainder did not know.

Figure 46 hereafter lists the skills considered most important for the future by businesses in the sample.

Figure 46: Three most important skills for future (%)

Question: Which are the three most important skills which will become more important to this workplace? (Up to three responses possible). (n=30)



Source: Employer skills needs survey

On top of the list in Figure 46 is multi-skilled staff (50%), followed by marketing and sales skills (37%), staff that can deliver goods and services in a new way (37%), green skills (33%) and skills related to ITC systems management (27%).

7. Conclusions and Recommendations

7.1 Conclusions

The Namibian economy was already in a recession before the arrival of the COVID-19 pandemic. Sectors that recorded negative growth prior to the pandemic included mining, construction, wholesale and retail, transport, and private households with employed people. Sectors that recorded growth prior to the pandemic - tourism, manufacturing, and financial and insurance services – all now show negative growth rates because of the pandemic.

As a result of the pre-COVID recession, the economy started shedding jobs before the pandemic. This is evident from the high unemployment figure for 2018 (33%). Furthermore, the economy could not absorb new entries into the job market as is evident from the high youth unemployment figure for the same year (46%).

With the Namibian economy in recession, it is uncertain how and where new jobs will be created. With most of the major sectors in recession, and with most businesses experiencing financial difficulties and operating below capacity due to reduced demand, there is very limited scope for creating new jobs. This limits the potential for reskilling, as reskilling requires jobs elsewhere in the economy.

At this point it is difficult to identify possible sectors or jobs to be targeted for reskilling from the survey as most unemployed individuals report that they will want return to their previous employment. For most in the sample, this will be the tourism sector, and this sector is the one with the greatest uncertainty about the future.

The tourism sector is also the sector that is most likely to create new jobs as tourism businesses are more likely to employ more staff during the recovery. It is however uncertain when this will be.

Most businesses indicated that they will either re-employ furloughed staff, or recruit fully skilled workers or recruit workers that can be trained internally. This implies that businesses will look for existing skills and that they will recruit the same skills or recruit to train in-house. Tourism businesses traditionally have significant in-house training capacity for service staff.

Self-employed individuals are self-employed because they “have no other choice” and are keen to find fulltime employment. This suggests that the informal sector may not be a preferred option for retrenched workers.

The demand for traditional skills is still predominant, and very little evidence exists that would suggest that Namibian businesses who participated in the survey are looking to redefine their existing business models by embracing opportunities made possible by modern digital technology for example. In this respect, for example, the much-anticipated online shopping revolution never took place and perhaps will not for the duration of this pandemic.

Just as many tourism businesses are waiting for international travel to reopen and for the sector to return to its traditional format, despite clear evidence that it can no longer continue with the traditional models. With urgent calls for more sustainability and inclusivity after the pandemic, this sector will be in the spotlight for its ability to develop and deliver new models not only for generating rural jobs and income, but also for improvements in the conservation of iconic species and entire ecosystems. This offers exciting prospects that include regenerative agriculture and ethical, organic and wildlife friendly food production using both traditional permaculture and modern technology. But there is little evidence that this way of thinking is shaping the sector now.

Widespread retrenchments in specific sectors have created a large reservoir of surplus skills which most businesses feel will allow them to recruit without major difficulties. The pandemic did not cause specific skills to become redundant, it caused certain jobs to become less affordable. It is those at the lowest end of the job market that suffered the brunt of the retrenchments. Their skills do not enable them to work remotely, and there seems to be a sufficient supply of such skills. It is therefore quite possible that when the recovery takes place, many retrenched employees will return to their former employment, if they do not find additional employment in the meantime.

With economic conditions being precarious, many businesses have adopted a 'wait-and-see' strategy. They will not make major new appointments, and they are reluctant to make major investments as the future is simply too uncertain.

Prospects for employments exist, but maybe not in the traditional sense. Data presented here suggest that a multi-skilled, smaller work force may well become the way of the future.

There are many opportunities for self-employment, especially in agriculture and food production. Technology presents new opportunities for work in conservation, tourism and for protection of fragile ecosystems. But these jobs are not yet currently present in the economy. Yet, training facilities for such jobs as drone pilots, permaculture designers and beekeepers already exist. It is a matter of stimulating demand, especially among those who have already lost their regular work or those who do gig work. In such vein, a freelance tour guide may well become a permaculture designer and beekeeping helping communities with food production whilst reducing a low technology solution for human-wildlife conflict by using bees to protect crops from elephants. All whilst he or she guides tourists when the opportunity arises.

There are currently many private service providers that supply non-accredited training in the form of short courses. These include courses on drip irrigation, beekeeping, home baking, permaculture principles, drone piloting, aquaponics, backyard vegetable production, hydroponics and so forth. Under the current economic conditions and with so many households and workers under financial pressure the courses could help, almost immediately, with not only food security, but also with generating an income. Not only are such training opportunities affordable, but they are also not affected by the pandemic and can be delivered in person or online making them attractive to rural communities and communities too far away from the training sites. Such short courses could be used to supplement longer fully accredited courses and may well serve to stimulate future demand for formal education in such skills.

To change course and prepare for the new challenges stemming from this pandemic, creative solutions need to be found. Only time will tell if Namibia is ready for that.



7.2 Recommendations

1. Health and safety skills are needed in all sectors of the economy and it will become a crucial new skillset in the tourism industry during and even after the recovery period as future travel will emphasize client safety. Some current staff may be upskilled, and retrenched staff maybe reskilled to re-enter the sector as health and safety consultants and workers. There are possible business opportunities for small business ventures in this regard, and such businesses may service both the formal and informal sector.

2. When companies were confronted with the challenge of performing the same amount of work with less employees, it inadvertently created a need for multi-skilled staff, i.e., staff that could perform a wider range of tasks than what they were originally recruited for. This creates opportunities for upskilling existing staff in heavily affected sectors such as tourism. The need for multiskilled staff may exist for longer than just the recovery period. It may well become the norm for most future employment.

3. During the pandemic staff had to adjust their ITC skills to be able to communicate better using new digital technology necessitated by social distancing measures. This necessitated upskilling relevant staff in the use of digital platforms such as Zoom, MS Teams and the like. Remote working may well become a key feature for many businesses and as a result the need for upskilling staff to use the digital platforms efficiently may well exist for some time to come. There may well be potential opportunities for small businesses in this regard, which may present opportunities for reskilling in this field. Businesses or individuals who specialise and provide training in effective digital communication may well remain in demand long after the pandemic ran its course.

4. Although only a small number of businesses indicated that their staff had to learn to use new digital and ITC applications because of the pandemic, this may well change soon as the need for on-line and remote work and training increases. This constitutes a need for upskilling of existing staff, but also points to future training needs for new staff. In the tourism sector for example, experts predict that the use mobile booking and payment technology will increase post-pandemic due to the possible changes in manner with which new generations will travel. New demand for such skills will exist for the industry, but the need to upskill existing staff to cope with such demands may be more immediate. On-line shopping for crafters may well be a solution to continue trading and expand their markets as the decline of tourism greatly affected these artisans. But it is in its infancy in Namibia and has had mixed results.

5. It is unlikely that under current conditions the unemployed in tourism sector will be able to re-join employment in the sector for at least a year or more. Retrenched workers in this sector will therefore require reskilling before finding employment. Agriculture and specifically horticulture and food production hold great potential in this regard. Training could cover all areas of small-scale food production such as poultry and egg production, vegetable gardening, beekeeping, piggery, compost making and worm farming. Such ventures will help improve food security whilst generating an income for both individuals and communities. This type of reskilling could be done with local capacity and through short courses. There are several local businesses and organizations that offer food production and permaculture short courses that could be contracted to provide such courses. There is also potential to convert these into digital and on-line training courses.

6. Urban agriculture has great potential for providing food security and income to the urban unemployed. During the pandemic informal food vendors spilled over into the formal neighbourhoods to start selling food with great success. Currently food is imported into the city from local or even cross-border locations. There is thus great potential to grow and sell food in the city. The training capacity for this exists, and in some cases, joint ventures with various community-based and faith-based organization to train members in urban agriculture are already in existence. These could easily be upscalled to include for example trade unions whose members could be enrolled in such courses and who could become producers selling to local vendors and food outlets. This would require reskilling of the vulnerable urban workers.

7. The value of small scale food production will be further enhanced if producers could add value to the raw product. Food processing skills will allow producers to develop their product range and add value and quality. Basic food skills such as fermentation, drying, curing, preserving and canning will be needed to produce higher value food items such as jams and preserves, sauces and foods with a longer shelf-life. There are several culinary training establishments that could provide this training by means of short courses. These could be converted into digital and on-line courses to extend their application.

8. *The COVID-19 pandemic forced many companies to work in non-traditional ways. Many were forced to introduce remote work, introduce teams and more shifts. This is reflected in the future skills for new recruits identified by businesses. Among the skills rated highest for future recruits include communication skills, teamwork, people management, ITC skills and problem solving. From this one can assume that remote work presented human resource and communication challenges that place extra demand on existing skill and for which employees would have to upskilled in future.*

9. *Pre-COVID skills for which there is demand include technical skills, literacy skills, basic numerical skills, computer literacy and basic IT skills. These also require upskilling; most likely as part of existing TVET courses. The current demand for advanced ITC skills and green skills are low; most likely because most businesses in these three sectors seem to prefer continuing with their traditional business models, rather than move on to new ones. In other sectors such as retail for example more businesses seem keen to embrace new options such as on-line stores. Sector experts all emphasized personalized service and actual experience as the future of their industry rather than digital products.*

10. *The COVID-19 pandemic has had a significant impact on the types of skills that will be needed in the longer term. The following were identified as important future skills by businesses in the sample:*

- *Administrative and clerical skills*
- *Product knowledge skills*
- *Routine skills used in producing goods and services*
- *Human resource management skills*
- *Working in teams where not everyone can be in the place of work*
- *ICT skills among the general workforce*
- *Financial management skills*
- *Risk management and planning skills*
- *Skills related to the management of ICT systems*
- *Green skills/skills for environmental sustainability*
- *Delivering goods and services to customers in new ways*
- *Marketing and sales skills*
- *Multiskilled staff who can manage a wider range of tasks than before*

▶ ANNEXURE A: INTERVIEWEES AND FOCUS GROUP PARTICIPANTS

NO	NAME	INDUSTRY
1	Agra Provision	Training; Agriculture
2	Avani Hotel	Tourism
3	GIZ	Task team
4	Gondwana Collection	Tourism
5	Health Industry Forum (HIF)	Health care
6	Hospitality Association Namibia (HAN)	Tourism
7	Labour Resource and Research Institute Namibia (LaRRi)	CSO
8	Manica	Transport
9	Metal and Allied Namibia Workers Union (MANWU)	Union
10	Namibia Environmental Investment Fund (EIF)	CSO
11	Namibia National Labour Organisation (NANLO)	Union
12	Namibia Training Authority	Training
13	Namibia Wildlife Resorts	Tourism
14	Namibian Professional Hunters Association (NAPHA)	Tourism
15	NUST Hotel School	Training
16	Social Security Commission (SSC)	Government
17	Trade Union Congress of Namibia (TUCNA)	CSO
18	Namibia Informal Sector Organisation (NISO)	Union
19	M2M Global Technologies	Training; Service provider

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