



International
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The Next Normal: The Changing Workplace in Africa





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PREFACE

The destabilizing effects of the COVID 19 pandemic have had dramatic social, economic and health effects across the African continent. While the consequences of the COVID 19 pandemic have been significant across the board, some groups—such as informal and casual workers—have been hit especially hard.

The COVID pandemic also had a dramatic effect on enterprises, with many struggling to remain afloat due to higher costs, government restrictions, and changing consumer behaviour. Many African enterprises faced new costs, often associated with health and safety measures to ensure customers and workers are not exposed to COVID-19.

Despite these challenging circumstances, many enterprises and their workers across the continent have taken a wide range of steps to adapt to this fluid environment. They have changed everything from the characteristics of their working space to their human resource strategies, and throughout it all have demonstrated great resilience and adaptability. Yet it is clear that the disruptive forces unleashed by COVID-19 will have longer-term implications for African labour markets.

To better understand these dynamics, the Bureau for Employers Activities of the International Labour Organization (ILO) and the ILO Regional Office for Africa partnered with employer and business membership organizations (EBMOs) from across Africa to study these changes, enterprises' views about them, and steps enterprises are taking in response to them. To try to capture key trends most relevant for enterprises, we focus on four closely related areas: (1) the working space; (2) workplace relations and labour law; (3) skills development, knowledge sharing and productivity; and (4) human resources management.

Herein, we present the top ten trends we have identified about how workplaces in Africa are changing. The report also has a number of additional companion pieces: A set of five African company case studies; a policy guide for EBMOs examining how workplaces are changing; a guide to help enterprises navigate the emerging post-pandemic environment; and a set of products on E-platforms. In addition, national reports, based on the survey and interview findings, have been developed in eight countries: Uganda, Kenya, Tanzania, Eswatini, Mozambique, Nigeria, Seychelles and Ghana.

We feel this report raises a number of extremely pertinent issues related to Africa's labour markets and more broadly, the priorities outlined in the Abidjan Declaration. It is clear that the disruptive effects of the COVID 19 pandemic will leave a legacy in respect of how, where and when we work. Workplace legislation will clearly need to be adapted to meet the emerging reality of workplaces. The ILO remains fully committed to working with our constituent partners to address these issues.

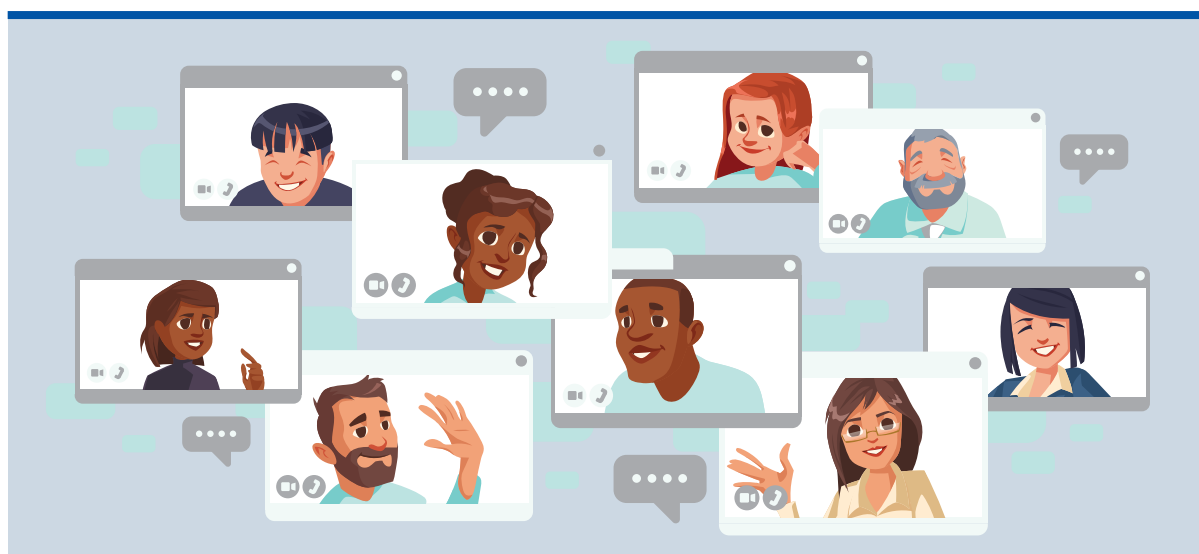
Deborah France-Massin
Director, the Bureau for Employers Activities

Cynthia Samuel-Olonjuwon
Regional Director for Africa



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Executive Summary



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EXECUTIVE SUMMARY

For economies, enterprises and workers across Africa, the COVID-19 pandemic has brought about unprecedented changes to the workplace. Some of these changes have been immediate, such as disruptions to supply chains or lockdowns that forced enterprises to close. Other changes—and perhaps the more significant ones—are long-term, with the COVID-19 pandemic reshaping and accelerating existing trends in workplace change. At its core, the pandemic has fundamentally altered where and how people work, upending many long-standing norms and practices. Enterprises and workers have made many changes, often out of necessity, though they have regularly brought unexpected improvements in productivity or working conditions.

This report documents these changes and

examines how enterprises from across Africa view and respond to them. It has been developed with support from the Bureau for Employers Activities of the International Labour Organization (ILO) and the ILO Regional Office for Africa, in partnership with employer and business membership organizations (EBMOs) from across Africa. The research covers fifteen countries in Africa, and takes a mixed-methods approach. One component is a survey conducted from June to November 2021 covering 1,017 formal sector enterprises, most of whom are members of EBMOs. Collectively, they employ some 750,000 workers. This is complemented by a broad-based literature review and 126 key informant interviews, mostly with top management and human resources professionals from the private sector. In addition, we conducted five in-depth case studies with multinational enterprises, each having operations in at least five African countries. While these various sources of information do not cover all parts of every economy in Africa, they provide deep and broad insights about how workplaces at urban, formal enterprises in Africa are changing.

This report highlights the top ten workplace trends driven by the pandemic, which are:



TREND 1: Remote work has grown dramatically during the pandemic



Perhaps no single trend has defined the pandemic era more than the shift from physical to remote work. Of the nearly 750,000 people working for the more than 1,000 enterprises surveyed, nearly 36 per cent worked remotely during the pandemic. Of course, this means that a majority of workers did not work remotely. This evidences a key finding: what someone does often determines how they work—both now and in the future. One of the most important characteristics associated with remote work is the sector in which the enterprise operates. Higher-paying service sector enterprises had the greatest share of remote workers. Remote work is least likely in lower-wage sectors such as hotels and restaurants,



retail and wholesale trade, and manufacturing. Another factor associated with remote work was the health risk for an individual worker. For enterprises that did not adopt remote work, the reasons varied but unsurprisingly the need for a physical presence at the workplace was a key driver. Most enterprises that had remote workers paid for some or all of their worker's associated costs, though this was more common amongst large enterprises.





TREND 2: Most future workplaces in Africa will be in-person or hybrid, not fully remote



Though remote work has been a defining characteristic of the pandemic, most enterprises still have an in-person component of their operations and plan for their post-COVID workplaces to be in-person or hybrid. Though 85 per cent of enterprises had some remote work during the pandemic, less than 6 per cent were completely remote. After the pandemic, even fewer enterprises-only

4 per cent-said they planned to have a fully remote workplace. Again, the sector of the enterprise heavily shaped this decision. Hybrid work is likely to dominate in higher-skilled services sectors, from professional services to financial and insurance activities to administrative and support services. It will be far less common in other sectors, for example hotels and restaurants. For many enterprises, the location of work will be shaped by the value they see in the in-person workplace. Physical communication and collaboration, as well as spontaneous interactions, have value that many enterprises feel cannot be replicated online.



TREND 3: Remote work is changing how some enterprises hire



The COVID-19 pandemic has caused significant changes in the way that enterprises think about their future workforce, giving them newfound flexibility to find workers who best fit their business. Three in ten enterprises in Africa have already changed their hiring criteria to include new groups of workers they had not previously considered, such as fully remote workers not living near the workplace. This trend was strong in administrative and

support services as well as information and communication technology. The eroding connection between location and work presents both opportunities and challenges for enterprises in Africa. Increasingly, they will have to compete with enterprises from around the world for workers with key skills. This could drive up wages, a challenge particularly for SMEs. The change presents opportunities for workers, including access to remote job opportunities domestically or even abroad without migrating. This trend will also affect trade unions and EBMOs, with unions especially facing new challenges and opportunities when trying to organize and engage with a geographically disparate workforce.



TREND 4: Health and safety measures were widely adopted and beneficial for workplaces



Changes at physical workplaces were widespread during the pandemic, and included steps such as establishing sanitation stations, installing protective barriers, checking worker temperatures, rearranging workspaces and providing personal protective equipment (PPE) to workers or customers. The most common change by far was establishing hand

washing or sanitizing stations—a low cost, high impact step implemented by nearly 90 per cent of enterprises.

Changes were most common in the human health and social work sector, though enterprises with a significant in-person presence such as manufacturing or hotels and restaurants also commonly made changes. Large enterprises were much more likely than micro & small enterprises to make any type of change to their premises. Despite the challenges, many enterprises reported that these workplace changes had positive effects on production efficiency, the customer experience, and worker morale.



TREND 5: Flexibility & adaptability have helped enterprises navigate the pandemic



Flexibility has been one of the most cited words when enterprises described changes to their working space. Two-thirds of enterprises said workforce flexibility had become more important during the pandemic. Enterprises have increased the flexibility they get from their workers while also contracting out some areas to external workers. Internally, many enterprises have increased shift work and or reduced working time to prevent

redundancies. The latter was especially common amongst manufacturers, with over 40 per cent increasing their use of reduced hours contracts. Only about one in five enterprises reported increased use of contractors during the pandemic. The two most common reasons for this were the need for a more flexible workforce and the need for skills that were not part of the core business.



TREND 6: Digital, communication, innovation and teamwork skills are now top priorities for enterprises



The changing nature of work during the COVID-19 pandemic has underscored long-run trends in the skills needs of enterprises. Survey respondents highlighted four different types of skills as being vital to their future success: digital skills, communications skills, creativity and innovation-related skills and teamwork and collaborative skills. More than 40 per cent of enterprises cited each of these skills as a top three need in the future. Enterprises also noted that workers with a range of complementary

skills are especially valuable. Enterprises have also changed the ways that they train, share knowledge and collaborate. Digital training courses have been broadly adopted – by over 50 per cent of enterprises we surveyed. Enterprises face ongoing challenges with the cost of reskilling and upskilling staff, with two-thirds noting that these costs should be borne either by enterprises and donors or public funding from the regular government budget.



TREND 7: Productivity has improved or remained constant at most enterprises



For many enterprises who were pushed to find new ways to do things, this has been an inadvertent consequence of the pandemic. 46 per cent of Africa's formal enterprises said that COVID-related changes resulted in productivity gains, while another 39 per cent said that production efficiency had stayed the same. Productivity gains were especially common amongst service enterprises. They were least common amongst manufacturers, who were the most likely to say that it had worsened efficiency. Productivity gains have been driven in part by the push to find digital processes to replace analogue ones. Many enterprises also reorganized their

physical workspaces which sometimes led to more productive ways to organize workspaces. Increased worker dedication was also cited by enterprises as a key factor driving productivity growth. Many enterprises – about four out of five – have changed how they think about productivity, with a similar share saying they had increased their focus on outputs as the key measure of productivity. Enterprises now use a range of methods to monitor performance, but just one in eight focused on measuring hours and just 7 per cent tracked time worked through software or other tools.





TREND 8: The pandemic has deepened gender inequality at work



While the drivers of this trend are many and complex, one of the most important is the disproportionate burden of unpaid care work borne by women. This burden has only increased due to school closures which, in an extreme case like Uganda, stretched nearly two years. Women also provide a disproportionate amount of care for sick family members. These realities mean that working from home often presents unique challenges for women.

Another driver of the deepening gender inequality is the higher likelihood of women holding more vulnerable temporary and part-time positions. Women are also more likely to work in hard-hit sectors such as leisure, hospitality, and retail. The pandemic has also contributed to an increase in other employment-related risks that have disproportionately affected women, such as the increase in gender-based domestic violence while working from home. The pandemic only exacerbated existing challenges for women in Africa, including a greater likelihood to work in a low-skilled occupation, work in informal employment and face worse working conditions than men.



TREND 9: Social dialogue has been reinvigorated during the pandemic



The vast majority of enterprises we surveyed had workplace dialogue during the pandemic, with the most common topic being workplace health and safety, discussed at 86 per cent of workplaces. National and sectoral dialogue has also been common, with trade unions and EBMOs taking on important roles

representing their members and contributing to numerous bipartite and tripartite agreements across the continent. A significant share of enterprises also noted that labour relations had improved during the pandemic. 37 per cent of enterprises said that relations with workers had improved while only 14 per cent said they had worsened. While the overall trend in labour relations was positive, some sectors fared better than others. Enterprises with a significant in-person component to their work, such as manufacturers or hotels and restaurants, were among the most likely to say that labour relations had worsened.



TREND 10: Labour laws have struggled to keep pace with rapid workplace changes



The COVID-19 pandemic has changed many aspects of work, driving new trends and hastening others that were already underway. Many changes have been adopted by necessity—such as the mass shift to remote work—and look set to define work for the foreseeable future. However, the legal and regulatory frameworks in many countries have not kept up with the changing ways people work. Business leaders noted that they

thought labour market regulations were behind the curve. There are numerous issues that enterprises believe need to be addressed, for example workplace health and safety and governance of remote work.





COVID-19 AND CHANGING WORKPLACES IN AFRICA: AN OVERVIEW

For economies, enterprises and workers across Africa, the COVID-19 pandemic has been unprecedented, both in the disruptions it has brought and the ways that it has reshaped and accelerated long-term changes to the workplace. The immediate effects of the pandemic were often extreme – for example, lockdowns that forced enterprises to close, making some question whether they could afford to pay their bills or pay and retain their employees. Numerous studies documented these immediate effects. For example, an Africa-wide business survey in 2020 found that the pandemic significantly affected employment, with 18 per cent of staff laid off. Micro and small enterprises were hit particularly hard. It also found that business revenues were down.¹ A more recent report from the International Labour Organization (ILO) noted that even in the third quarter of 2021, working hours were still 5.6 per cent lower than their pre-pandemic levels.² Another Africa-wide survey, which focused on MSMEs, found that at one point in the pandemic small enterprises were only operating at 30-40 per cent capacity, a significantly lower level than larger enterprises.³ Micro and small enterprises cited cash flow as their chief concern, whereas larger enterprises noted issues around reduced opportunities to meet customers and the need to diversify offerings.

Individual country studies similarly showed the severity of the immediate impacts of the pandemic. In the Seychelles, more than 90 per cent of enterprises reported that they could only partially operate or had to fully close, and 95 per cent said the pandemic reduced their profits. Nearly 60 per cent said they did not have the cash flow to maintain staff and business operations at current levels. In Kenya, more than half of enterprises said they planned to reduce staff costs, through reducing hours, number of staff or other means. While remote work increased, 43 per cent of enterprises noted that no more than one in five of their staff were working remotely. More than 84 per cent of enterprises said the pandemic had a somewhat or very adverse effect on finance and cash flow.⁴

Perhaps more significant are the ways in which the COVID-19 pandemic has reshaped and accelerated long-term trends in the workplace. At its core, the pandemic has fundamentally changed where and how people work. The in-person interactions that have long characterized work and economic activity now present health and safety risks. In

response, enterprises have made big changes in where and how they work, with some restructuring workplaces and others adopting digital tools and

“Covid-19 has been an experience for our organization, we have to cope with what we never experienced or envisaged. This has brought about a lot of transformation in the way we conduct our business and taught us to always prepare for unexpected occurrences. Thus, we are now more futuristic in our operations.”
- Nigerian enterprise



new technologies – often for the first time. One study found that one in five enterprises in Africa either “started or expanded their use of digital technology in response to the COVID-19 shock.”⁵ Another study found that a majority of enterprises (65 per cent) accelerated their digital transition



during the pandemic.⁶ The pandemic has reshaped the skills needs of enterprises, while also forcing many of them to rethink how they measure worker performance. It has pushed enterprises across the board to focus on flexibility and adaptability in their operations.

The pandemic has sent shock waves across the world of work, upending many long-standing norms and practices. Enterprises are questioning fundamental assumptions about their operations, such as whether they still need physical premises and how they measure what workers do. Workers are also rethinking key assumptions about work. This will drive long-term changes in the types of work being done, how work is performed, and what skills are required to do that work.⁷ The changes to the workplace will be complex, overlapping and significant.

This report, based on extensive qualitative and quantitative research across Africa, highlights the top ten trends that are reshaping workplaces across the continent. A significant amount of research has been undertaken to understand both the short-term effects and long-term consequences of the pandemic. Some key

themes have attracted widespread coverage: the shift to remote work, the future of the office, the adoption of technology, and the changing skills needs of enterprises. Other important themes, such as the effects on workplace relations and the future of labour laws, have not been covered in as much depth, but have been identified as important areas for future research. This report provides new insights into these topics, based on extensive data collection and analysis about workplaces in Africa.

In order to capture a breadth of views about how workplaces were changing, we asked survey participants to single out one word to best describe how the pandemic was changing work spaces and workforces. For the first of these questions, about work spaces, one of the most commonly cited themes was “flexibility” or “agility”. Workplaces of the future – whether physical or digital – will need to be more adaptable than those in the past. Another common theme was technology and innovation – with enterprises responding with words such as “digitalization” or “online”. Some enterprises summarized their sentiments that the overall effect of the changes on their enterprises, arguing that future workplaces would be “better” or that the changes would be “positive”. A few said

Figure 1. What One Word Best Describes How the Pandemic Will Change Your Physical or Remote Working Space?



Source: Qualtrics survey, note that some responses were edited to correct misspellings or use of multiple words

the opposite, that change would be “difficult” or negative.

For the second question, about how the workforce is changing, enterprises often cited similar words and themes. For example, one of the most common words cited for the changing workforce was also “flexibility”. Many enterprises also cited words that relate to the digital future of workforces, such as:

“digital”, “technology”, “tech-savvy” and “virtual”. Some focused on the future skills that workers will need, for example saying their future workforce would be “innovative”, “creative” or “multi-skilled”. Others focused on productivity and efficiency. Workforce resilience and diversification were also themes cited by some enterprises. Together these various themes illustrate the many complex ways that work is changing across Africa.

Figure 2. How Will the Pandemic Change Your Workforce in the Coming Years?





APPROACH



The COVID 19 pandemic has brought about changes to the workplace that have been dramatic in scope and scale – far more than can be covered in this report. To better understand these dynamics, the Bureau for Employers Activities of the International Labour Organization and the ILO Regional Office for Africa partnered with employer and business membership organizations (EBMOs) from across Africa to map these changes, enterprises' views about them, and steps enterprises are taking in response to them. To try to capture key trends most relevant for enterprises, we focus on four closely related areas: **(1) the working space; (2) workplace relations and labour law; (3) skills development, knowledge sharing and productivity; and (4) human resources management.**

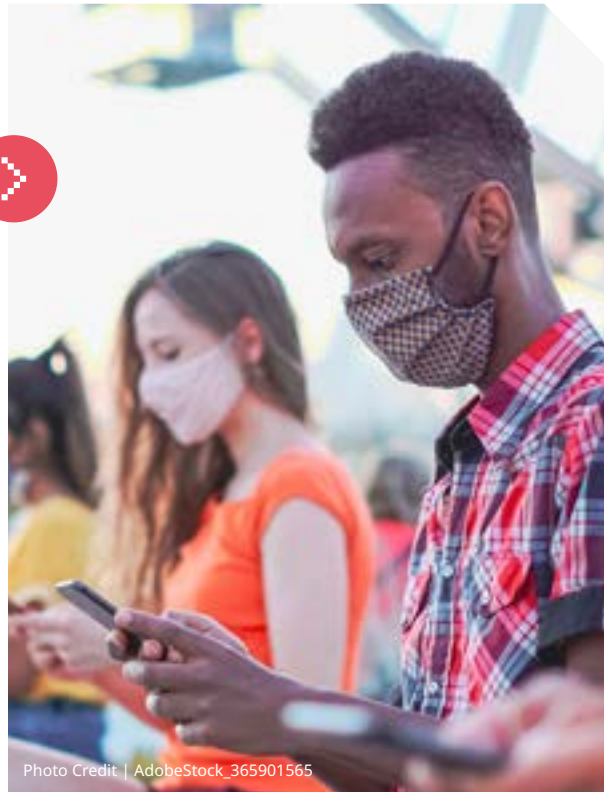


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METHODOLOGY

The research approach is broad-based and multi-faceted, covering fifteen countries across Africa. These countries were selected based on a number of criteria, including logistical considerations, diversity of country experiences with the pandemic, diversity of country contexts, and feasibility of implementation of a survey through digital means. In most cases, research was conducted in partnership with national EBMOs.

The research adopted a mixed-methods approach, using a range of tools including a literature review, a business survey administered through Qualtrics, key informant interviews, and in-depth case studies of a small number of

enterprises. Together these various methods provide information that is broad-based, covering a range of enterprises and countries, yet also allows for deep insights into key issues.

The business survey administered through Qualtrics covered 1,017 formal enterprises across 15 countries in Africa: Cameroon, Comoros, Cote D'Ivoire, Democratic Republic of the Congo, Egypt, Eswatini, Ghana, Kenya, Morocco, Mozambique, Nigeria, Seychelles, South Africa, Tanzania, and Uganda. It included both quantitative and qualitative questions, though the later were limited in the length of responses that could be provided. Survey questions covered the topics noted above, as well as business characteristics—to allow disaggregation by business sector, size, location, and other attributes. Surveying took place between June and November 2021. Survey invitations were distributed amongst members of EBMOs, or in some countries to the wider business community. Though the survey is not necessarily representative of all enterprises and workers in Africa, the broad coverage helps provides useful insights about changes in the formal sector which comprises a significant share of GDP and employment in countries across Africa.



The survey covers 15 countries and 1,017 enterprises who collectively employ nearly 750,000 people



To complement the broad-based data collection through the survey, the research team conducted 126 key informant interviews (KIIs) in Eswatini, Ghana, Nigeria, South Africa, Tanzania and Uganda. These interviews were conducted mostly with high-level respondents in the private sector, such as business owners, top managers and CEOs and Presidents of EBMOs. Some interviews were also conducted with key informants from other backgrounds, such as academia, government and trade unions. These KIIs provided a qualitatively rich understanding of important trends across Africa.

Five in-depth case studies were also conducted with multinational enterprises each having operations in at least five countries in Africa. These enterprises hail from a diverse range of sectors and include: building and construction aggregates; business services; manufacturing in consumer goods; transport, trade and logistics; and manufacturing and distribution in the pharmaceutical and healthcare sectors. The case studies consider how firms are managing change and anticipating the post-COVID 19 environment through a workplace lens.



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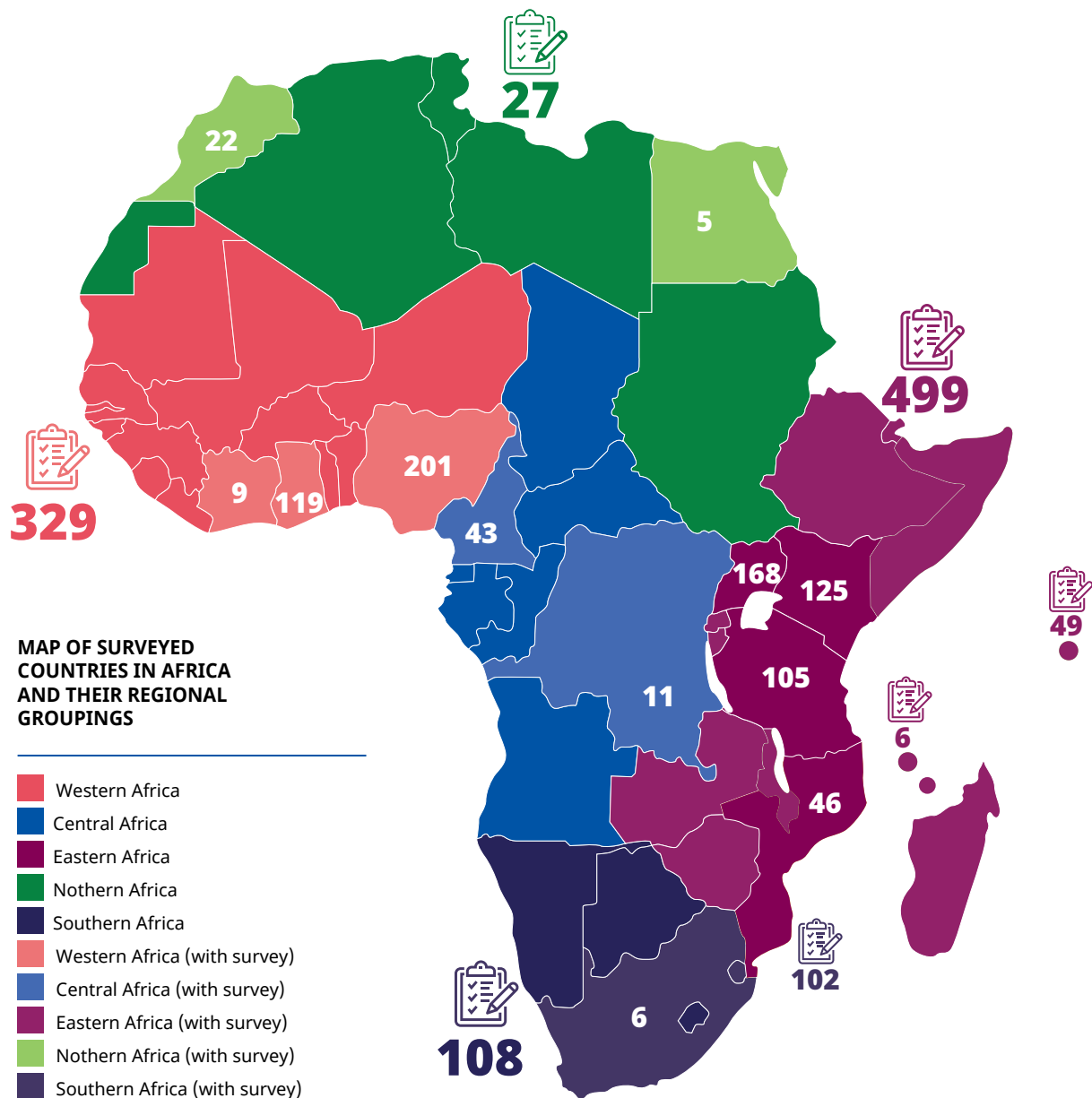




PROFILE OF SURVEY RESPONDENTS

The business survey administered through Qualtrics covered 1,017 enterprises across 15 countries in Africa, though respondents were concentrated in Eastern and Western Africa. A detailed breakdown of the countries, regions, and survey respondents is included below in Figure 3.

Figure 3. Number of surveys completed, by country and regional grouping



Note: totals for individual countries are listed in white numbers. Totals for regions are listed in coloured numbers that correspond to the colour of the region. Regional groupings come from the ILOs existing regional groups for Africa.



Participating enterprises hailed from a wide range of sectors, with manufacturing being the most common, followed by other service activities and financial or insurance activities. Participating enterprises ranged in size significantly, from a single employee to 100,000 workers. The majority of enterprises were micro, small and medium enterprises (MSMEs), though 42 per cent were large enterprises, a high share that is likely influenced by the survey methodology.⁸ The median business size was 56 workers. Participating were mostly male-managed, not engaged in imports or exports, and domestically owned, though significant minorities of enterprises responded in other ways.

Figure 4. Number and Distribution of Survey Respondents, by Sector of Economic Activity



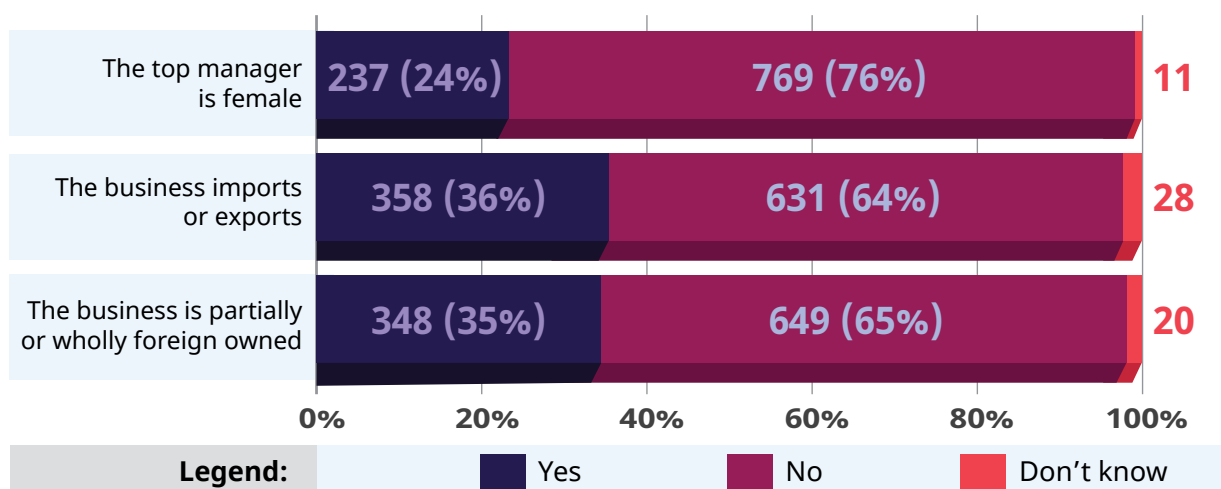
Figure 5. Statistics on Business Size, measured by number of workers



Enterprises are classified by size according to the following definitions: Micro enterprises – between 1 and 4 employees; Small enterprises – between 5 and 19 employees; Medium enterprises – between 20 and 99 employees; and Large enterprises – 100 or more employees. These definitions are the same as those used in World Bank Enterprise Surveys, and are similar to those in many countries in Africa.



Figure 6. Other business characteristics



Though the survey covers many enterprises, it is not necessarily representative of the total population of enterprises in Africa, or any individual country. Survey participants are self-selecting on two levels—they must voluntarily be a member of the EBMO and must voluntarily choose to participate in the survey. They are not randomly selected from the population of enterprises. Weighting of responses was considered but would not address the non-random data, nor could it address the low number of surveys collected in some important economies, notably South Africa and Egypt. Other challenges to weighting include the lack of consistent data and definitions of enterprise size across all surveyed countries. Given this, we present the survey, with these caveats, using the unweighted data.

The effects of our approach on the survey data are evident. In comparison to the overall population of enterprises, the survey over-represents enterprises

in services sectors, particularly in a few subsectors such as “Financial and Insurance Activities”. Other sectors are underrepresented, for example the retail, sales or trade sector, which tends to account for a significant number of individual enterprises in many developing economies. The survey has a significant share of large enterprises (42 per cent), whereas in most economies in Africa, large enterprises account for only one or two percent of all enterprises. Beyond business size and sector, enterprises we surveyed might not be representative because they came from the membership of EBMOs. These enterprises are more likely to be formal, have collective bargaining agreements and view employment relations differently from the average enterprise. Lastly, because the survey was conducted online, it almost certainly over-represents enterprises that are technologically sophisticated and excludes small and non-digital enterprises.

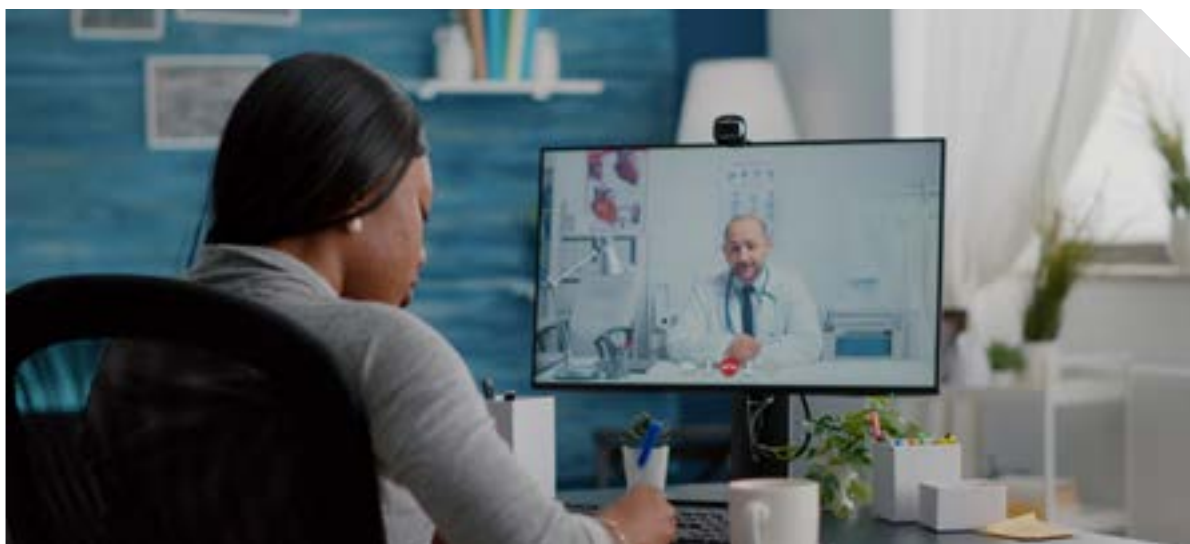


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PROFILE OF INTERVIEWEES



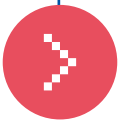
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The continent-wide survey of enterprises was complemented by 126 qualitative interviews conducted across 6 countries, most of which (106) were done as part of country studies associated with this main report. These country studies took place in Mozambique, Uganda, Eswatini, Ghana, Nigeria and Tanzania. Interviewees included enterprises, representatives of business organizations, officials from government, representatives of trade unions, non-governmental organizations and other stakeholders. The remaining 20 interviews were conducted as part of other research efforts that

were a part of the overall Changing Workplace in Africa initiative. Fifteen of these were conducted as part of the development of the EBMO guide. These interviewees came mostly from business organizations and enterprises across a range of countries in Southern and Eastern Africa. The final five interviews were conducted with representatives from multinational enterprises, all of whom work across at least five countries in Africa. These interviews were done to inform in-depth case studies that were also part of the Changing Workplace initiative.

Country	Number of interviews	Types of interviewees
Uganda	20	Government ministries, departments, and agencies; enterprises in various sectors
Eswatini	14	Enterprises in various sectors; business organizations; government ministries and councils; non-governmental organization
Ghana	21	Enterprises in various sectors; Workers' unions; Ministries, departments, and agencies
Nigeria	28	Enterprises (including CEOs and senior business leaders); Senior officers from government Ministries, Departments and Agencies (MDAs); other stakeholders such as labour unions, academics and media outfits
Tanzania	23	Enterprises in education, technology, manufacturing, hospitality, transport and communications.
South Africa & nearby countries	20	Enterprises in tourism, retail, banking and finance, mining, logistics, manufacturing, and other services, as well as EBMO leaders and other stakeholders





TREND 1: Remote work has grown dramatically—but unevenly—during the pandemic



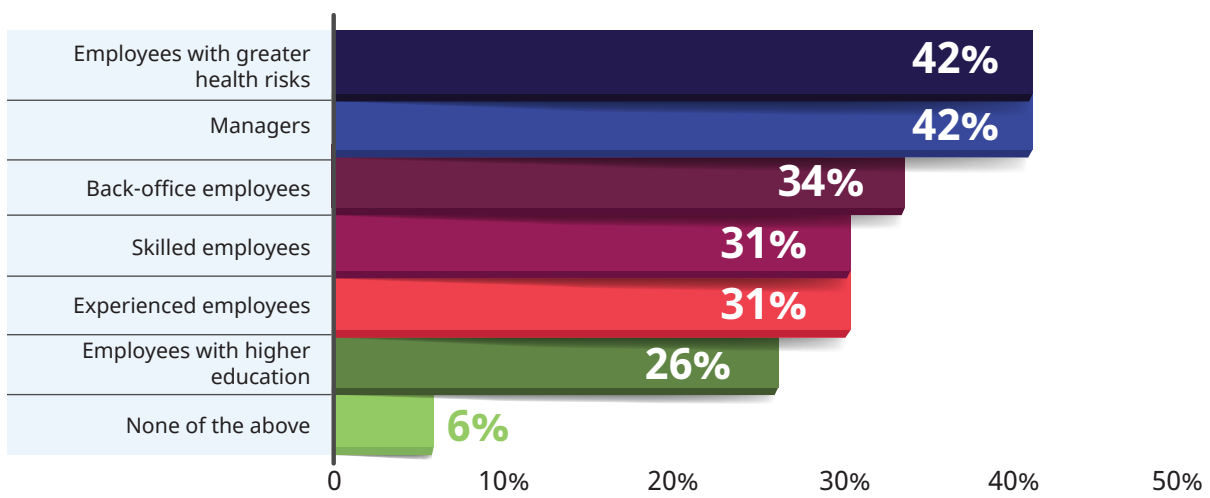
Perhaps no single trend has defined the COVID-19 pandemic era more than the shift in work from physical workplaces to remote or home-based work. Africa is no exception to this global trend. For formal sector enterprises in Africa, remote work has been incredibly common during the pandemic – over 85 per cent of the surveyed enterprises reported that at least some of their workforce engaged in remote work during the pandemic. Of the nearly 750,000 workers working for the more than 1,000 enterprises surveyed, nearly 36 per cent worked remotely during the pandemic. The pervasiveness of remote work in the formal sector in Africa is echoed by other sources. A survey in South Africa found that 79 per cent of formal workers reported working remotely during the pandemic.⁹ Half of Kenyan employers reported they were somewhat or very likely to increase the number of staff that worked remotely at least one day per week on a permanent basis.¹⁰ However, remote work in Africa's very large informal sector remains limited. When looking at all workers, including those in the formal and informal sectors, the ILO estimated that only 7 to 14 per cent in Africa had the potential to work from home.¹¹

The McKinsey Global Institute estimates that over 20 per cent of the global workforce could be away from the office

most of the time and be just as productive. This is especially true in high-skilled jobs in sectors such as finance, insurance and IT.¹² But what about the other 80 per cent? The pandemic has shown that many enterprises and workers do not have the opportunity to work remotely or have not benefitted from this trend. In short, what someone does often determines how they work – both now and in the future. A number of factors influence whether a worker is likely to work remotely, or whether a business implements remote work for their workers.

The characteristics of a worker and her/his role at the enterprise was often connected to the likelihood of working remotely. One key factor associated with remote work was the health risk of workers – clear evidence that enterprises made special accommodations for the important needs of this group of workers. Beyond that, job roles were also related to the prospects of working from home, notably more so than experience or education. This is because the tasks required for these positions are often more suitable for remote work. As our research in South Africa found, “Covid19 has demonstrated that work from home is best suited for workers who are required to execute relatively independent tasks, when knowledge can be easily shared electronically or from a distance.”¹³

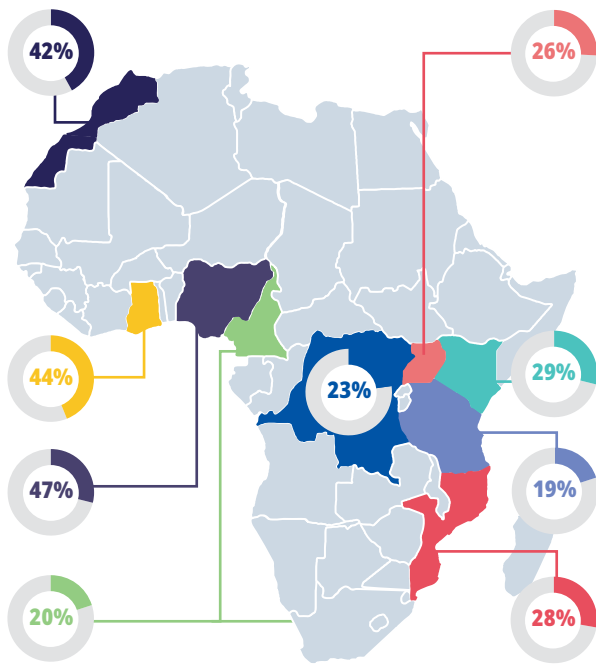
Figure 7. Share of enterprises that said that the following types of workers were more likely to work remotely during the pandemic



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

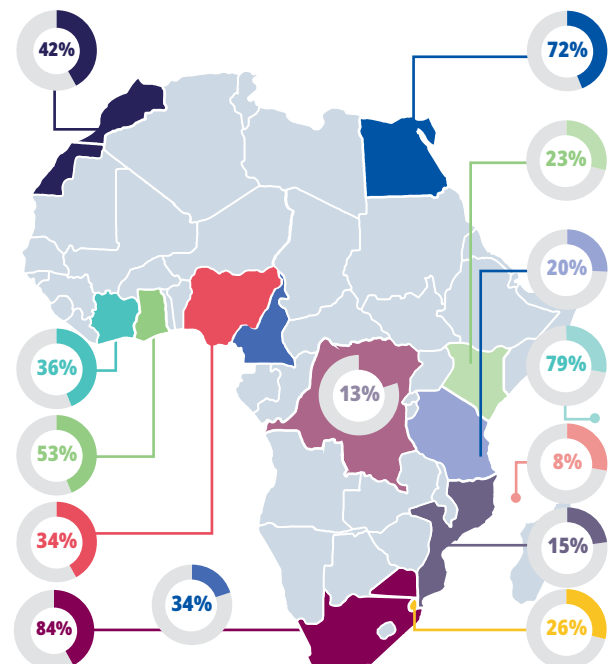


Figure 8. Share of workers who worked remotely during covid, by region



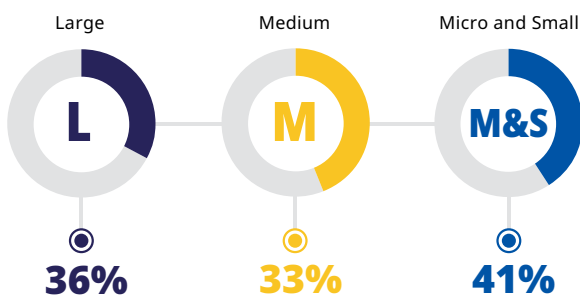
Source: ILO ACTEMP Survey of Enterprises in Africa, 2021
 *Note: Countries with less than ten responses are not included above. Countries with small numbers of responses, such as the Democratic Republic of the Congo, should be interpreted with caution.

Figure 9. Share of individuals using the internet in surveyed countries



Source: International Telecommunication Union World Telecommunication/ICT Indicators Database; data from most recent available year which varies from 2017 to 2020

Figure 10. Share of Workers Who Worked Remotely during COVID, by enterprise size



“Because of the nature of our business, we cannot afford most of our staff to be working out of office. What we have done is to place staff on rotational mode (especially the office staff). However, all our technical staff have fully resumed physically in office because they have to be on the field to work on our facilities.”
 -Enterprise in Nigeria

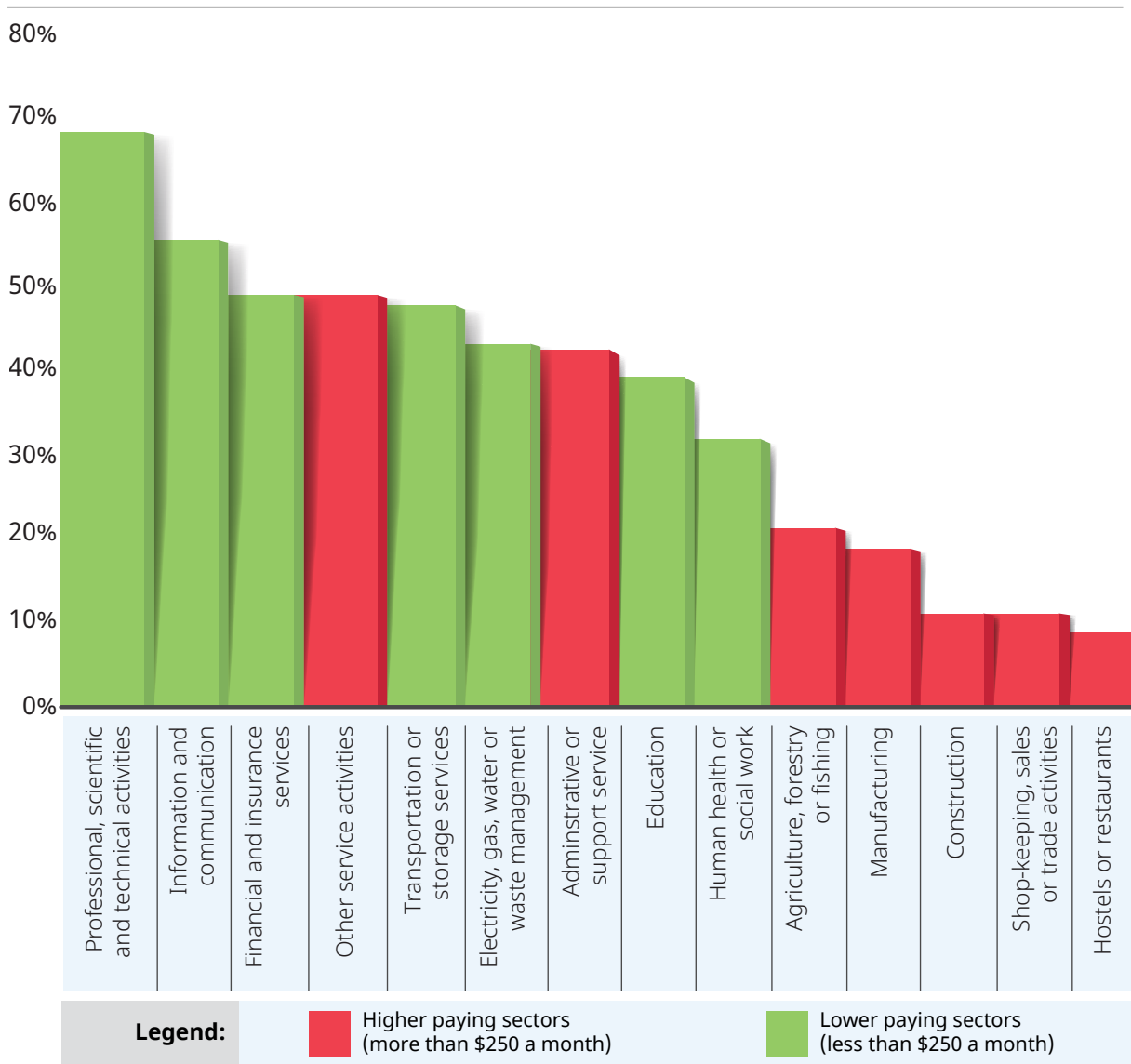


Another important characteristic that is associated with the likelihood of remote work is the sector in which an enterprise operates. In a number of sectors, enterprises produce goods and services that simply cannot be delivered remotely. Manufacturing is a prime example, as the physical production of goods inevitably requires the physical presence of people to complete tasks. On the other hand, service industries could often adopt remote work much more easily. This is especially true of higher-value service sectors such as information and communications, or professional services.

These sectoral patterns are closely linked to one of the most important challenges of remote work: workers in lower paying sectors are the least likely

to benefit from remote work, while those in high paying and high skilled sectors are the most likely to benefit. The benefits of remote work—such as personal safety—accrue to those who already tend to enjoy the highest wages and best working conditions. Figure 11 shows this pattern clearly. The sectors where remote work is most likely are highly paid service sectors. On the other hand, the sectors where remote work is least likely are those which tend to have the lowest wages. These include hotels and restaurants, retail and wholesale trade, and manufacturing. These findings also suggest that remote work may be uncommon in the informal sector, given that it is dominated by activities such as agriculture, small trade and small manufacturing.

Figure 11. Share of workers who work from home, by industry and average monthly earnings

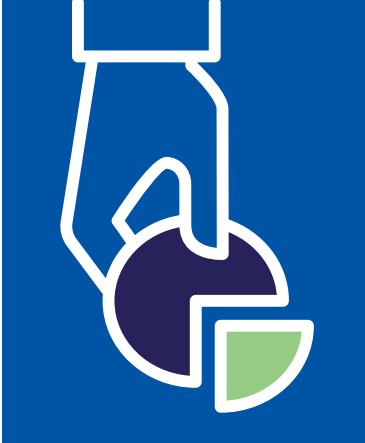


Source: ILO ACTEMP Survey of Enterprises in Africa, 2021
 Note: sectors are grouped into two categories: lower paying (less than \$250 a month) and higher paying (more than \$250 a month), based on average monthly earnings from countries across Africa. Monthly earning data from ILO Stat, detailed in Sheet #1. Minimum 25 survey responses per sector. Potential misclassifications in "other service activities" are likely.

The reasons why enterprises did not adopt remote work varied, but responses from different sectors show a number of key trends. First, the need for physical presence at the workplace was a top reason why enterprises from many sectors did not adopt remote work, with the exception of a few highly skilled service sectors (finance, ICT, etc.). It was the most frequently cited reasons across all sectors, but especially so in construction and manufacturing. Second, enterprises almost universally did not cite worker refusal to adopt remote work as a key reason. Only 1 per cent of

all enterprises cited this as one of the top three reasons they did not adopt remote work. This may be evidence of the joint commitment of workers and employers to do whatever was necessary in the face of the pandemic's unprecedented challenges, or simply a result of our online survey that likely overrepresents tech-savvy enterprises and workers. Finally, neither implementation costs nor the lack of digital culture at the workplace were commonly cited as a significant barrier to adopting remote work.

Figure 12. Share of enterprises that cited each factor as a reason they did not adopt remote work, by sector



	Limited or poor internet connectivity between the company and the worker	Workers refused	It was not necessary for business continuity	Costs of implementation were too high	Risk of lost productivity	Lack of control over workers	Lack of systems for coordinating work remotely	Lack of digital culture at the workplace	Workstations or work processes could not work remotely	Other
Administrative or support services	27%	0%	17%	13%	10%	23%	29%	6%	15%	40%
Agriculture, forestry or fishing	20%	3%	33%	9%	22%	6%	20%	9%	38%	28%
Construction	12%	0%	23%	12%	19%	23%	12%	12%	50%	15%
Education	38%	3%	15%	15%	11%	8%	19%	23%	21%	21%
Financial or insurance activities	20%	1%	16%	9%	30%	29%	29%	12%	22%	35%
Hotels or restaurants	7%	0%	43%	16%	18%	9%	11%	14%	41%	18%
Human health or social work	6%	0%	35%	6%	15%	6%	19%	4%	31%	35%
Information and communications	21%	0%	19%	12%	23%	16%	9%	5%	16%	42%
Manufacturing	7%	1%	19%	7%	29%	8%	21%	8%	58%	19%
Other service activities	11%	1%	24%	5%	22%	16%	13%	8%	22%	33%
Professional, scientific or technical activities	18%	2%	24%	4%	33%	31%	18%	12%	20%	29%
Shop-keeping, sales or trade activities	16%	2%	48%	8%	18%	8%	4%	4%	44%	16%
Supply of electricity, gas, water or waste management	20%	3%	14%	9%	23%	26%	23%	17%	29%	40%
Transportation or storage services	9%	2%	33%	7%	21%	12%	14%	9%	44%	19%

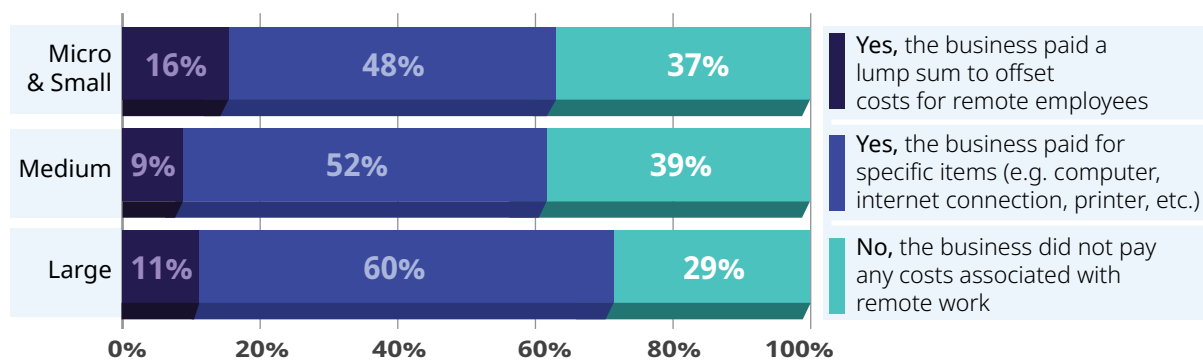
Source: ILO ACTEMP Survey of Enterprises in Africa, 2021
 Note: minimum 25 responses per sector



Despite comparatively low rankings globally, Africa's ICT infrastructure was not commonly cited by our survey respondents as a reason they did not implement remote work. For example, according to the Global Digital Quality of Life Index in 2021, Ghana ranks 104th out of 110 countries in part due to unstable mobile internet connectivity and poor internet speeds. About one-fifth (20 per cent) of Ghanaian enterprises indicated that this was a reason they did not implement

remote work. However, it was only the fifth-most cited reason in the country. In this area, Kenya performed especially well. Only eight percent of enterprises cited internet infrastructure as a reason they did not implement remote work – making it one of the three least cited reasons. Of course, these results may be influenced by our survey approach, which was digital and focused on formal enterprises in large cities.

Figure 13. Share of enterprises that paid costs associated with remote work, by business size



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Many enterprises paid for some or all of the costs associated with their workers working remotely. However, workers were more likely to have these costs paid if they worked in a large enterprise. 71 per cent of large enterprises reported paying these costs for their workers, which was about 8-10 per cent higher than the share of micro, small, and medium enterprises that paid these costs. Enterprises that had at least some foreign ownership were also more likely to pay for some or all costs associated with remote work than domestically owned enterprises – 78 per cent as

compared to 59 per cent. This likely reflects the increased capacity of these enterprises to pay for these items, especially in the challenging financial times that many enterprises experienced at the onset of the pandemic. Enterprises funded this through a range of means. For example, some enterprises in South Africa converted transport, meal subsidies or travel budgets into work from home allowances to assist workers to purchase ergonomically sound office furniture or to pay for the cost of internet access.¹⁴

Box 1.

Case Study on TransUnion Africa's support to workers working from home

Like many enterprises, the shift to working from home at the start of the pandemic required TransUnion Africa, a consumer credit reporting agency with operations in eight countries in Africa, to make major changes to its operating model. To facilitate this new mode of work, TransUnion, which has 600 employees in Africa, took a range of steps to facilitate and cover the costs associated with workers working from home. Free internet was installed in workers' homes and each worker was allocated US\$500 and a designated list from which to purchase items such as office chairs, monitors and

cameras. On the African continent, where many countries grapple with power cuts because of insufficient power supply or unreliable power supply, including loadshedding, TransUnion supplied workers with battery packs to ensure that their work could continue seamlessly. New starters received a package, delivered to their home, containing all the hardware and software they would need to set up their "home office" and to enable them to work comfortably and effectively. These steps helped TransUnion and its workers make the transition to being a fully remote business during the pandemic.



TREND 2: Most future workplaces in Africa will be in-person or hybrid, not fully remote



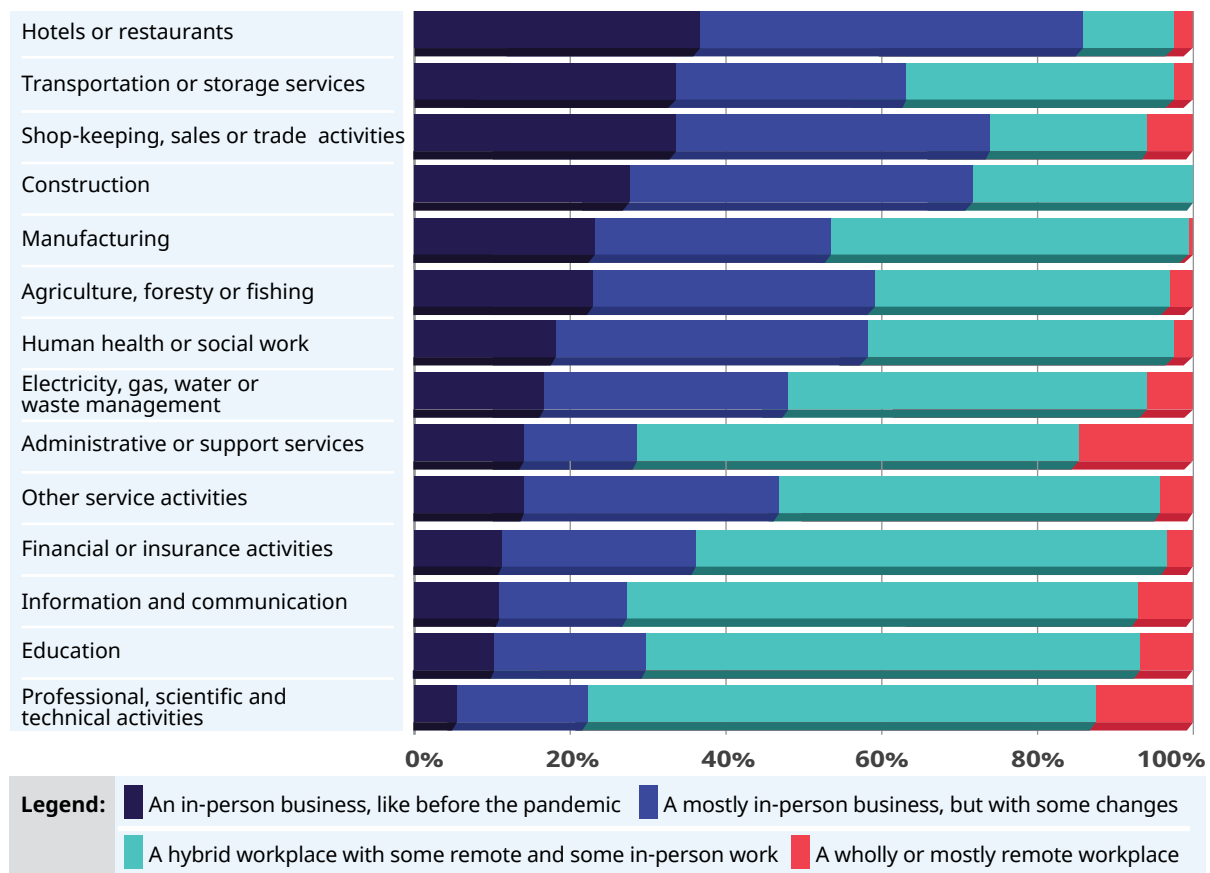
Though remote work has been a defining characteristic of the COVID era, most enterprises continue to have a notable in-person component of their operations and plan for their post-COVID workplaces to be largely in-person or hybrid. Despite the fact that 85 per cent of enterprises in our survey had some level of remote work during the pandemic, less than 6 per cent of all the enterprises were fully remote. When enterprises were asked about the future model of their workplace, just 4 per cent said that they planned to remain a fully remote business after the pandemic was over.

In the coming years, many enterprises plan to use a hybrid workplace model, with some work taking place remotely and other work being done at the business location. This finding has been echoed in other global studies, for example by the Boston Consulting



Group, which called the hybrid work “the new remote work.”¹⁵ Enterprises may spend some time fine tuning exactly how their remote work model looks, for example by studying the relative effectiveness of remote and co-located work. This should allow them to “critically consider the ways in which a hybrid workplace might be more effective.”¹⁶

Figure 14. Future business model, by sector

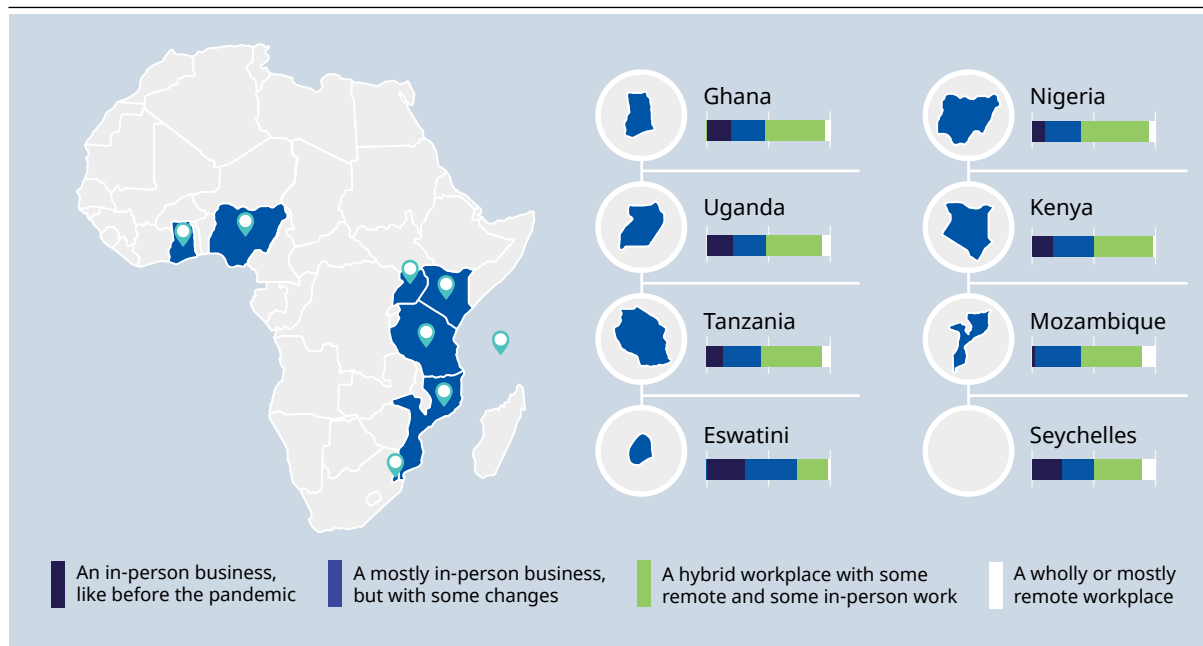


Source: ILO ACTEMP Survey of Enterprises in Africa, 2021



One of the most important drivers of the future workplace model that enterprises adopt will be the sector in which they operate. Hybrid work is likely to be the dominant workplace model across a range of higher-skilled services sectors, from professional services to financial and insurance activities to administrative and support services. However, it will be far less common in other sectors, most notably hotels and restaurants – where nearly 9 in 10 enterprises plan to return to a predominately or wholly in-person business model. Transportation, manufacturing and construction – all enterprises with a significant in-person component – are also less likely to plan a permanent move to hybrid work.

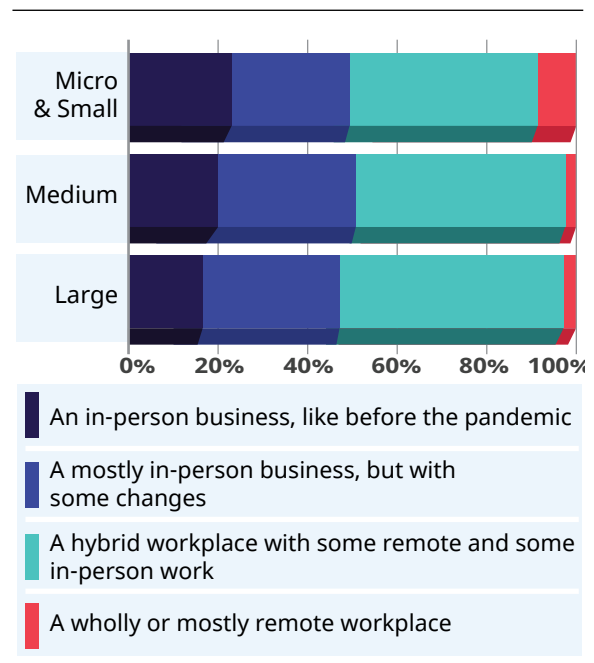
Figure 15. The future workplace model, by country



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

While hybrid workplaces are set to increase across Africa, enterprises in some countries seem more likely to do so than enterprises in others. Here, our survey suggests that Nigeria leads the way, with some 56 per cent of enterprises planning a hybrid work model. Mozambique may also see a significant share of hybrid workplaces, with 49 per cent of enterprises planning to use this model after the pandemic, and another 11 per cent planning a fully remote workplace. This is despite the fact that only 15 per cent of the population regularly uses the internet. On the other end of the spectrum, over 70 per cent of enterprises in Eswatini plan to return to some type of in-person business, either like they operated before the pandemic or with some changes. Enterprise size seems to have less influence on future workplace plans though the share planning to have a fully remote workplace was highest amongst micro and small enterprises, likely due to the number of skilled service enterprises in this group. Similarly, the sector of operations also influences the choice of workplace arrangements. In Seychelles, the reliance on tourism—a business which depends on face-to-face engagement with customers—may explain why half of the country's enterprises plan to be an in-person business in the future, despite high levels of internet usage.

Figure 16. Future workplace model, by business size



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Enterprises cited a range of reasons for their choice of future business model, but a key theme among many of them is that they value some aspect of the in-person workplace and way of doing business. For example, one enterprise we interviewed in Uganda said that human connection was a fundamental part of their work. "Our business is about interaction," said the manager, "meeting face to face, creating relationships. It's something we can't take away for our products." Others wanted to see the return of a particular part of doing business which they felt was more effective in person. Research in South Africa found that physical presence at the workplace was particularly important

Box 2.

"In-person" enterprises and the challenges of the COVID pandemic



The impact of COVID 19 on African enterprises have been immense, especially for companies that are not traditionally designed to flawlessly operate digitally. This reality is evident in the experience of OneLogix, a logistics and supply chain enterprise with operations across nine countries in Africa.

Chief Executive Officer Ian Lourens describes the company as:

... an old-world, real economy style business. We have trucks that move loads. It is all physical stuff. Our 'workshops' aren't discussions, they are hands-on places where we fix machines and load trucks. So, when lockdowns were implemented, we had the difficulty of maximizing loads. Even where we had a full load getting somewhere, we struggled to load

up the truck for the return journey. That makes it very hard to turn a profit.

With a gradual return to normal and regular easing up of lockdown restrictions, Lourens feels for his industry returning to the office will bring positives for key parts of the business:

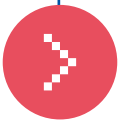
We need the face-to-face contact... There is lots to be gained from the serendipitous interactions in the corridor and other things you just can't recreate online. It is more productive to deal with issues instantly and in person. One exception is the information technology team. I find they can be fully online, and they seem to be enjoying it. There is some push back against the return to office. But in-person is better for us.

Enterprises cited a range of reasons for their choice of future business model, but a key theme among many of them is that they value some aspect of the in-person workplace and way of doing business. For example, one enterprise we interviewed in Uganda said that human connection was a fundamental part of their work. "Our business is about interaction," said the manager, "meeting face to face, creating relationships. It's something we can't take away for our products." Others wanted to see the return of a particular part of doing business which they felt was more effective in person. Research in South Africa found that physical presence at the workplace was particularly important "when tasks are interdependent or reliant on collaborative processes."¹⁷ Others wanted to restart particular parts of the business process, such as training, mentorship or orientation.

The shift in workplace models means significant changes for many enterprises. Our research in South Africa found that many employers that are transitioning to remote or hybrid work plan to reduce the amount of office space they rent. We also found notable trends in how office space is being used, for example the planned increase in hot desking. This is where workers book

office space in advance for a set period of time while they are at the office, instead of having a permanent desk. The reduction in office space that we found is a sentiment that has been documented elsewhere, for example in South Africa FNB's Commercial Property Broker Survey for Q1 2021, which considers broker perceptions of buying/selling market activity by major commercial property class. It showed 40 per cent of surveyed brokers are seeing office-bound companies revising their office space needs and in many cases downscaling.¹⁸ This trend is not just found in South Africa, but instead is likely across much of Africa and the world. For example, an August 2020 global study by McKinsey found that on average, enterprises planned to reduce office space by 30 percent.¹⁹ This is part of what the report argued was the need for a "systematic reconsideration of what exactly the office brings to the organization."²⁰ This includes not just rethinking how much office space they need, but also the design of that space for new and potentially more flexible uses. Of course, this trend may be somewhat muted in Africa given the limited size of the formal sector and the large number of informal enterprises, who may not reduce physical workspaces to the same degree.





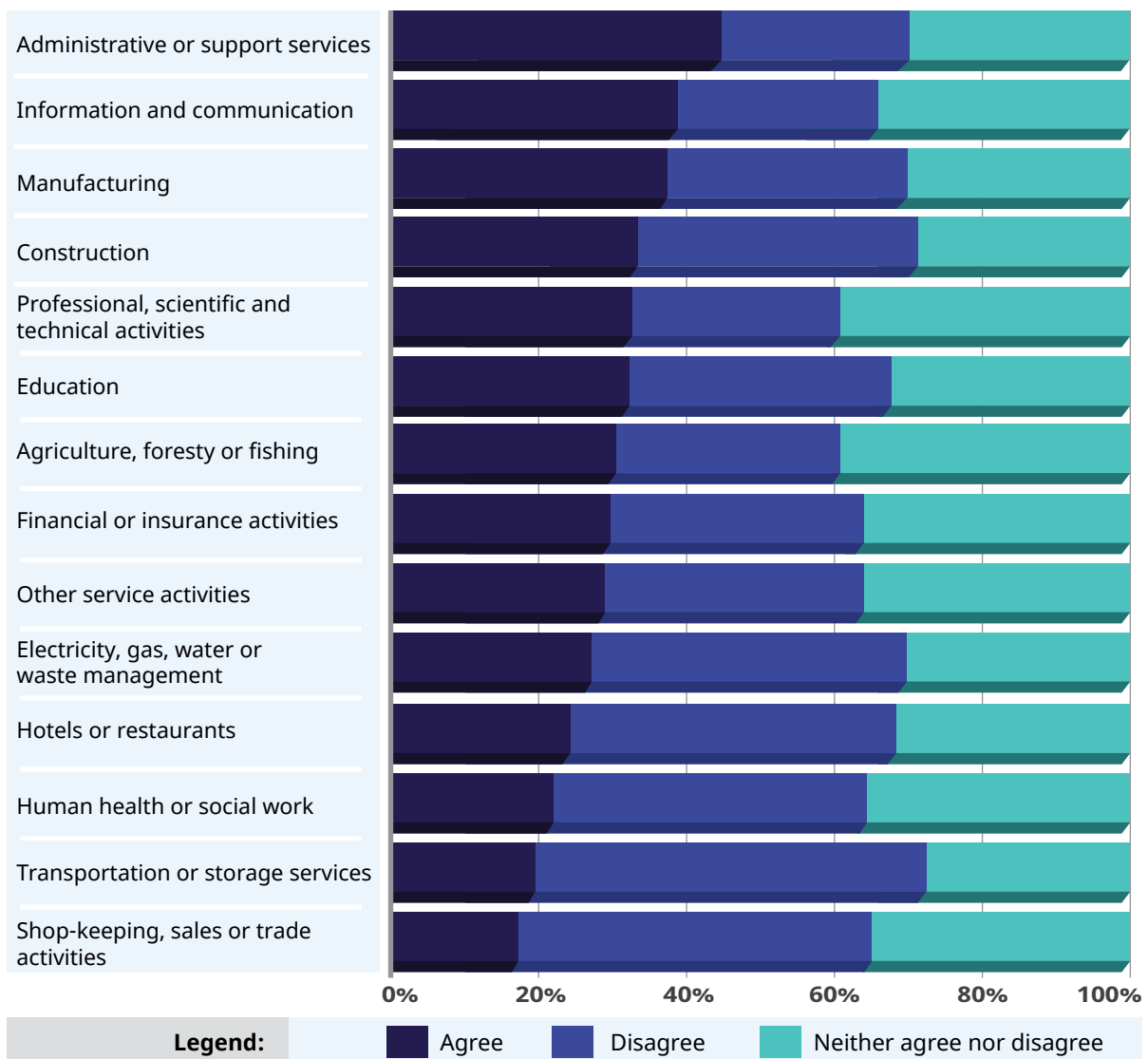
TREND 3: Remote work is changing how some enterprises hire



The COVID-19 pandemic has caused significant changes in the way that enterprises think about their future workforce, a change facilitated especially by the growth in remote work. For some enterprises, this shift gives them a newfound flexibility to find the workers who best fit the business. In the past, enterprises drew from a talent pool in a defined geographical area. Now, they are rethinking this limitation because of the newfound confidence in the productivity of remote workers as well as the widespread

acceptance of remote work. This allows these employers to expand their worker search from local to national, and in some cases even global. This was “an alien idea before, and while it won’t happen right away, it will happen.”²¹ According to MIT, this is a natural consequence of the shift to remote work. “When your organization is not limited to a co-located workplace, the idea of whom you can include in the workforce expands.”²²

Figure 17. Since the start of the pandemic, our business has changed its hiring criteria to include new groups of workers we had not previously considered such as fully remote workers not living near your workplace



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Many enterprises in Africa are already expanding their hiring to include groups of workers they had not previously considered, such as fully remote workers living elsewhere. This view was held by about three in ten enterprises – by no means a majority, but a significant number given the scope and scale of the change. This trend was particularly strong in administration services, where nearly 45 per cent of enterprises said they had changed their hiring criteria. Unsurprisingly, it was also common in the information and communications sector, where nearly 40 per cent of enterprises had changed their criteria. Even in manufacturing, a sector in which the physical presence of workers is a fundamental part of the operations, more than a third of enterprises noted they had expanded their hiring criteria. Other types of in-person enterprises, such as retail and wholesale trade and transportation and storage, were much less likely to expand their hiring, a reflection of the important in-person nature of their business. Surprisingly, the micro and small enterprises from our survey were leading the way in reaching out to new groups of workers, followed closely by medium-sized enterprises, while the large enterprises we surveyed lagged behind.

The declining interrelationship of location and work presents both opportunities and challenges for enterprises in Africa. One of the biggest opportunities is that it allows employers to access a deeper and more diverse pool of skills. This is especially important for African enterprises that often encounter shortages of select skills in the local labour market. The flip side of this opportunity, however, is that African employers will increasingly have to compete with enterprises from around the world for workers with certain skill sets. The competition for certain types of workers, especially those with tradable, remote skills such as information technology workers, will become increasingly global. This presents the threat of a “digital brain drain” from Africa, which could drive up wages and exacerbate existing skills shortages. While this would benefit some workers, it would be a major challenge for Africa’s SMEs. It could even create disincentives for enterprises to invest in worker skills if they see that these investments increase the risk of workers being “poached.” This further highlights the importance of improving skills training in Africa and broadening the continent’s skills base.

Much like employers, workers also face a host of opportunities, but also some challenges, from the pandemic-driven changes to workforces.

One of the most evident opportunities is that some workers will be able to access remote job opportunities domestically or even abroad without migrating. This has numerous potential benefits, such as reducing rural to urban migration and risks associated with irregular international migration. Income earned by local talents who work for oversea-based employers could also serve as a source of remittance-like income that can boost other parts of the local economy. It also presents a new development opportunity for governments seeking alternatives to export-driven manufacturing or the traditionally narrower business process outsourcing. However, these labour market changes may also present challenges for some workers if these more global labour markets are more competitive and reduce the ability of workers to negotiate for better terms and conditions.

The changing nature and location of an enterprise’s workforce will also affect trade unions and EBMOs. Trade unions may face a more challenging task trying to organize and engage with a geographically disparate workforce. In South Africa, for example, established trade unions in the financial services sector reportedly struggled to interact with members who were not physically present in the workplace. These challenges are despite the fact that many trade unions have started or increased their use of digital technologies during the pandemic, as an alternative channel to conduct their regular business. EBMOs are likely to face new challenges providing services to members with a multi-country work force. For example, the more complex and even multi-national work force of members will increase the complexity for EBMOs to assist with collective bargaining or advisory on issues such as employment law.

While a share of enterprises said their hiring criteria had expanded to include new groups of workers, many other enterprises (about 37 per cent) noted that their hiring criteria had not changed in that way. There are many reasons for this, including the sector of the business operations or the fact that remote work is still fairly new for most enterprises. For example, the manager of one enterprise in Eswatini noted, “we certainly could have at least 30 per cent of our staff working remotely on a full-time basis, but it is something that we are not extensively discussing at the moment.” This sentiment shows that a significant divergence amongst enterprises remains about the future of dispersed workforces, even if it is set to become increasingly common.



In South Africa, for example, established trade unions in the financial services sector reportedly struggled to interact with members who were not physically present in the workplace.





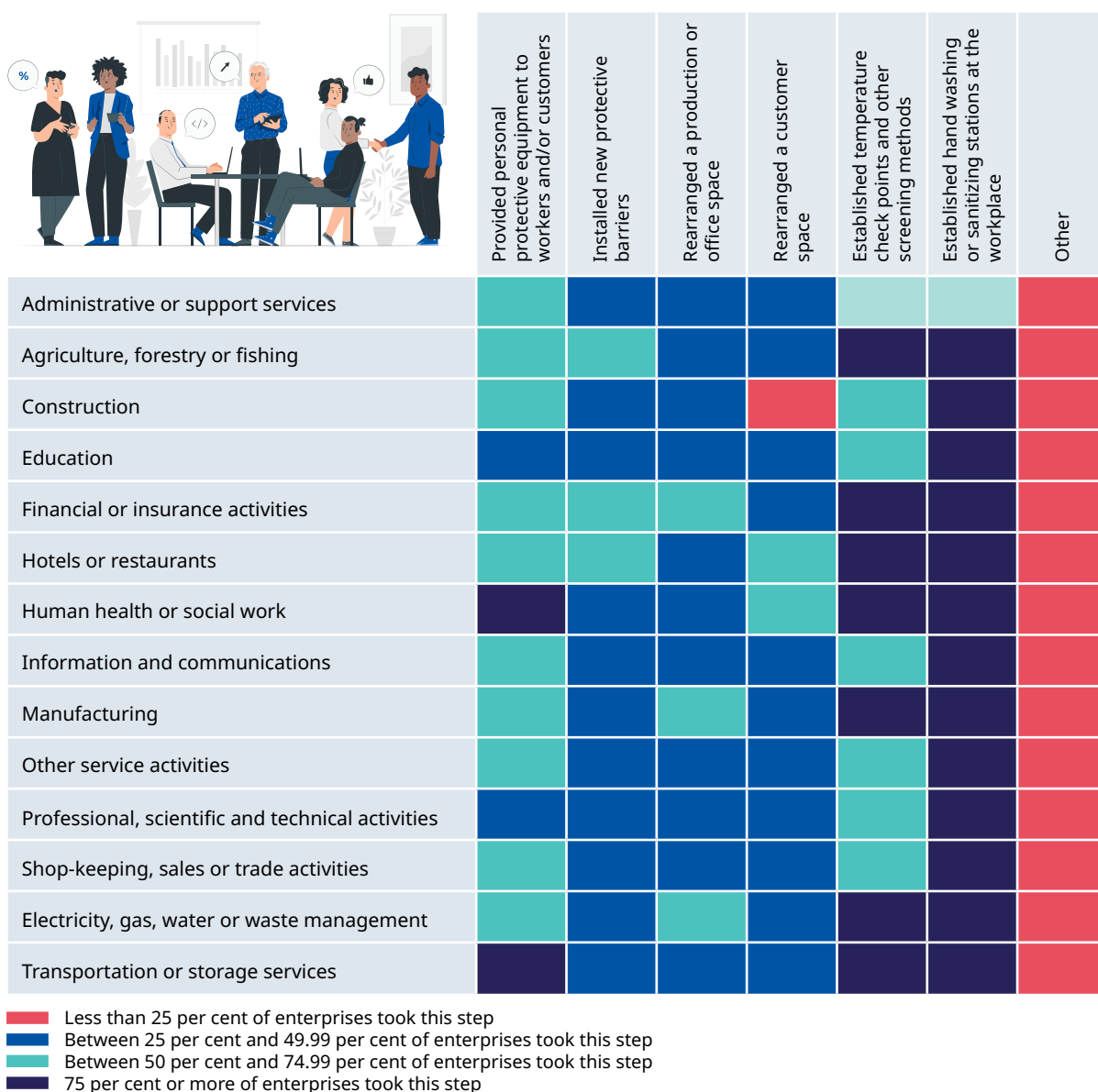
TREND 4: Health and safety measures were widely adopted and beneficial for workplaces



Complementing the shift to remote work has been another defining trend of the COVID pandemic: changes in the organization of, and safety arrangements at physical workplaces. These changes are often driven by the need to ensure a safe environment for workers and customers, though business continuity has also played an integral role in shaping these changes. Similar modifications to workplaces have been documented around the

world, with COVID-19 fundamentally changing how workplaces look and operate, with “workers’ well-being... driving the modifications.”²³ Changes have also been driven by government rules and mandates designed to ensure worker safety. For example, in Tanzania, the Ministry of Health provided new health guidelines, which then required employers to undertake and implement safety measures for their workers.

Figure 18. Likelihood of making changes to the business premises because of the pandemic, by sector



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Common health and safety measures taken by enterprises include providing personal protective equipment (PPE), installing protective barriers, establishing sanitation stations, checking temperatures, and putting barriers between workers to limit the spread of COVID. Changes were most common for enterprises in the human health and social work sector, though enterprises with a significant in-person presence, such as manufacturing or hotels and restaurants, were also amongst the most likely to make changes.

The most common change at the workplace by far was the establishment of hand washing or sanitizing stations – a low cost, high impact step implemented by nearly 90 per cent of responding enterprises. However, some enterprises made more extensive changes. In South Africa, for example, we found that some enterprises in manufacturing have had to re-design the layout of machinery and production lines to ensure social distancing and reduce the likelihood of COVID transmission.



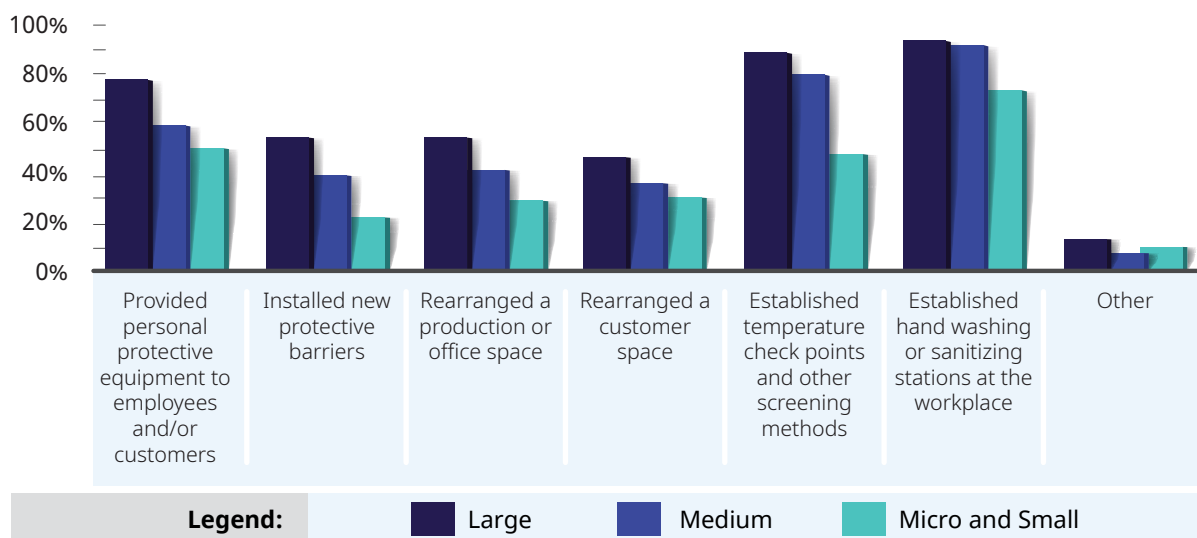
“Our physical workspace size has not changed, but we have introduced different safety measures by re-arranging <the> office to provide room for social and physical distancing. We put in place several health measures such as hand washing materials at many strategic places in the premise, we take temperature of staff and clients at regular intervals and disinfect our premises several times a day.”
-Enterprise in Nigeria



More prominent perhaps than the differences between sector was a clear trend where large enterprises were much more likely than micro & small enterprises to make changes to their premises. The differences were most pronounced in areas such as installing protective barriers and rearranging a production or office space, where large enterprises were about twice as likely to

implement these changes compared to micro & small enterprises. However, even for low-cost sanitizing or handwashing stations, micro & small enterprises lagged far behind large enterprises. This may be due in part to the financial constraints that many small enterprises faced in the pandemic, which were generally more acute than those faced by larger enterprises.

Figure 19. Likelihood of making changes to the business premises because of the pandemic, by enterprise size



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021





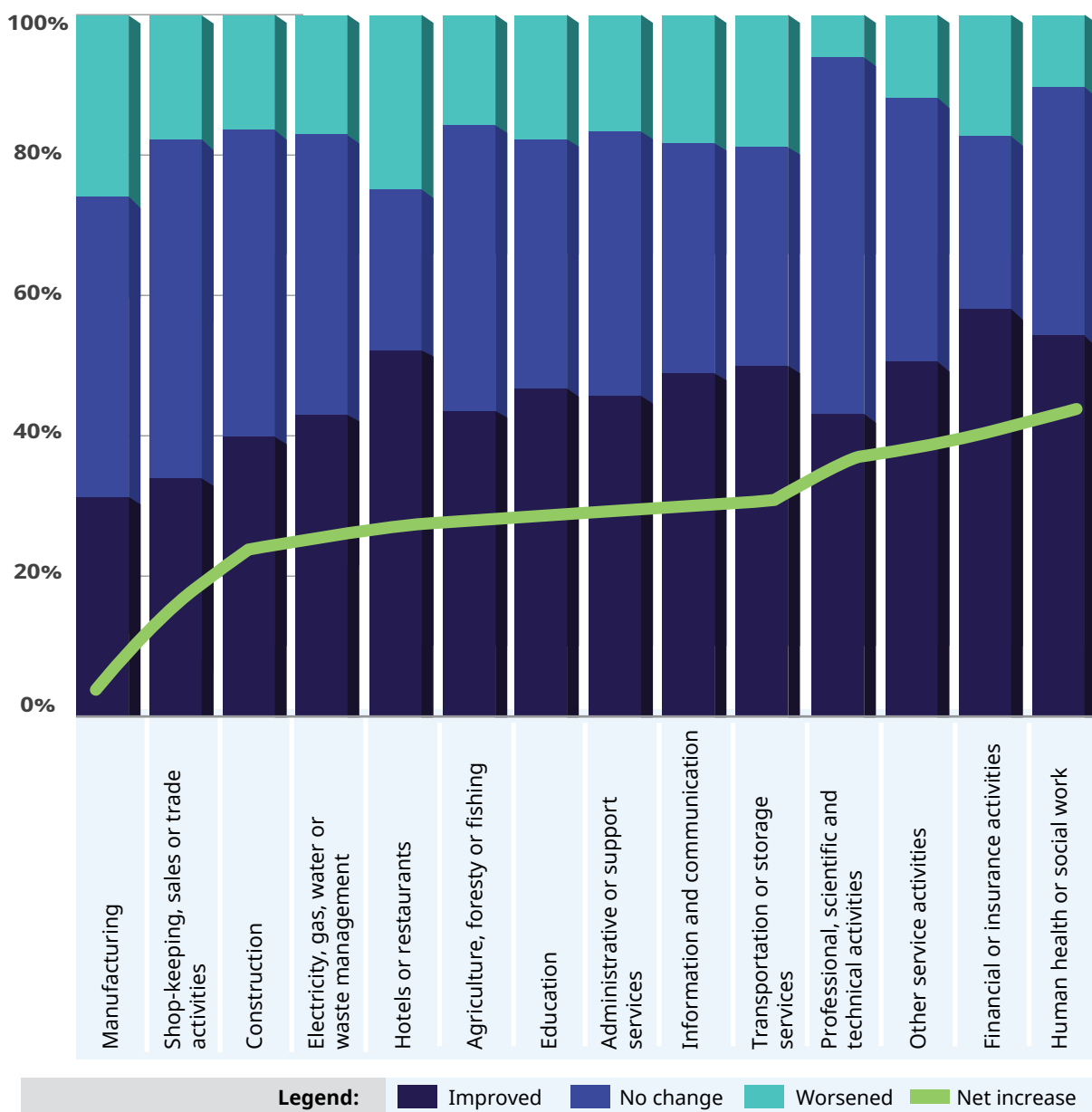
Beyond these common steps, enterprises also took other measures to protect workers and customers while keeping the enterprise running. Examples of other changes to physical workplaces include:

Putting up informational posters in the workplace	Changing working times to release workers early, avoiding peak commuting times	Establishing work zones to reduce human contact and facilitate contact tracing	Eliminating biometric entry systems to reduce touch surfaces
Restricting visitor entry, including the adoption of appointment systems	Conducting additional cleaning and sanitation of the workplace	Increasing the number of shifts (discussed further in Trend 5)	Installing new air filters
Adopting touchless payment services	Installing signage to direct people's movements through the office	Introducing high-tech products like ultra-violet lights to disinfect surfaces. ²⁴	

Because of the nature of our work, we had to adopt a shift system instead of remote work arrangement in a bid to observe the COVID-19 safety protocols. – Enterprise in Ghana

For enterprises and their workers, many of these changes look set to become a permanent feature of the workplace. One interviewee in Uganda noted that “as we now live and work in globally interdependent communities, infectious disease threats such as COVID-19 need to be recognized as part of the workspace.” Many of the changes enterprises are making now will remain as part of workplaces for years in the future.

Figure 20. Effect of changes to the business premises on customer experience, by sector



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Despite all of the challenges associated with changes at the workplace, a large number of enterprises report that these changes have had positive effects for the customer experience and for worker morale. Most importantly, for both of these metrics, the percentage of enterprises reporting that they benefitted from the changes was higher than the percentage that said the changes had negative effects on their business. The sectors where the greatest share of enterprises reported positive effects tended to be higher skilled services, such as human health and social work or financial and insurance activities. On the other hand, manufacturing enterprises were least likely to report that changes had provided positive benefits,

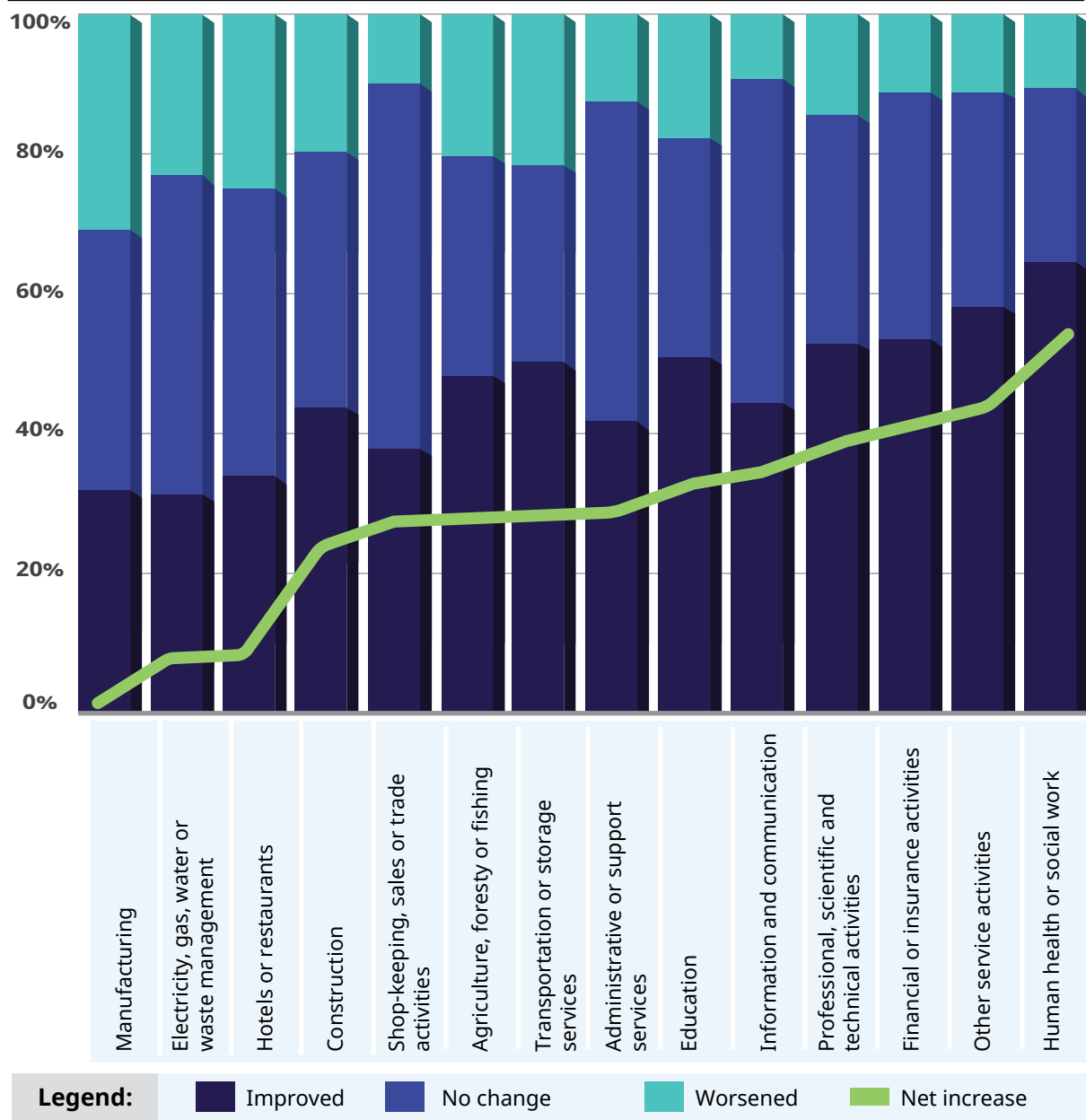
while also being most likely to report that changes had a negative effect. This was especially acute on the question of worker morale - where more than 30 per cent of manufacturers said changes had a negative effect.



Photo Credit | Pexels-august-de-richelieu-4427957



Figure 21. Effect of changes to the business premises on worker morale, by sector



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021





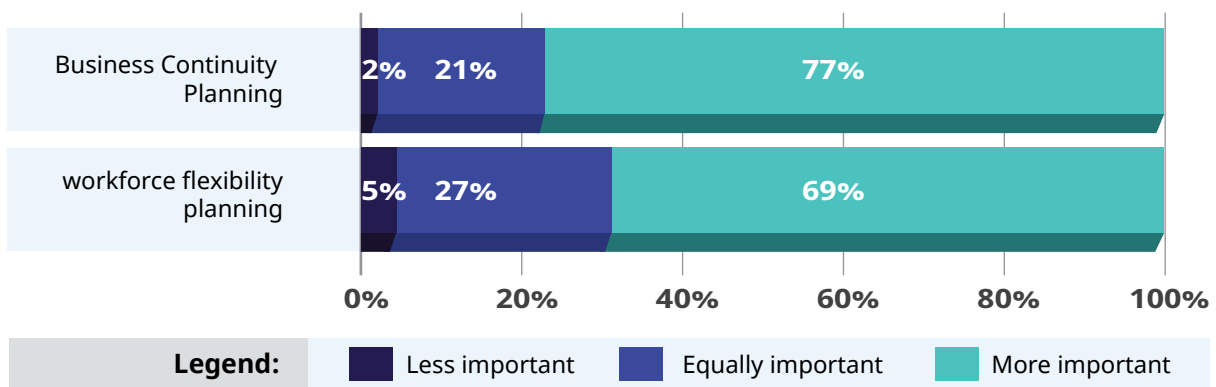
TREND 5: Flexibility & adaptability have helped enterprises navigate the pandemic



Throughout the pandemic, flexibility and adaptability have been a key theme for African enterprises. Flexibility has been essential for dealing with the many unexpected changes the pandemic has brought, including the lockdowns and other restrictions that have interfered with operations for many enterprises. When asked about workforce flexibility, two thirds of enterprises said that it had become more important during the COVID-19 pandemic. Business continuity planning, which helps enterprises continue to deliver products or services despite disruptive events, had become more important to more

than three quarters of enterprises during the pandemic. Many enterprises also see flexibility as being essential moving forward. When asked to provide one word to describe how the pandemic will change their working space, flexibility was the single most-cited word. Similar terms along the same lines were also regularly cited, such as innovation, adaptability, adaptation, and agility. Many of the same words were used when enterprises were asked how their workforce would change: flexibility, adaptability, agility, innovation, and evolution.

Figure 22. Change in importance of workforce flexibility and business continuity planning



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

In response to the many unanticipated changes brought by the pandemic, such as lockdowns or health-related changes to workplace operations, some enterprises have taken other steps to increase the flexibility of their workforce. Beyond remote work, discussed above, some enterprises have made internal changes to increase the flexibility of their own workforce while others have

contracted out some aspects of their business to external workers. One internal change adopted by some enterprises has been to scheduling, especially the increased use of shift work. This has enabled enterprises to continue operating while also reducing the number of workers at a workplace, thereby facilitating physical distancing and reducing the risk of transmitting COVID-19.



Photo Credit | pexels-monstera-5331198

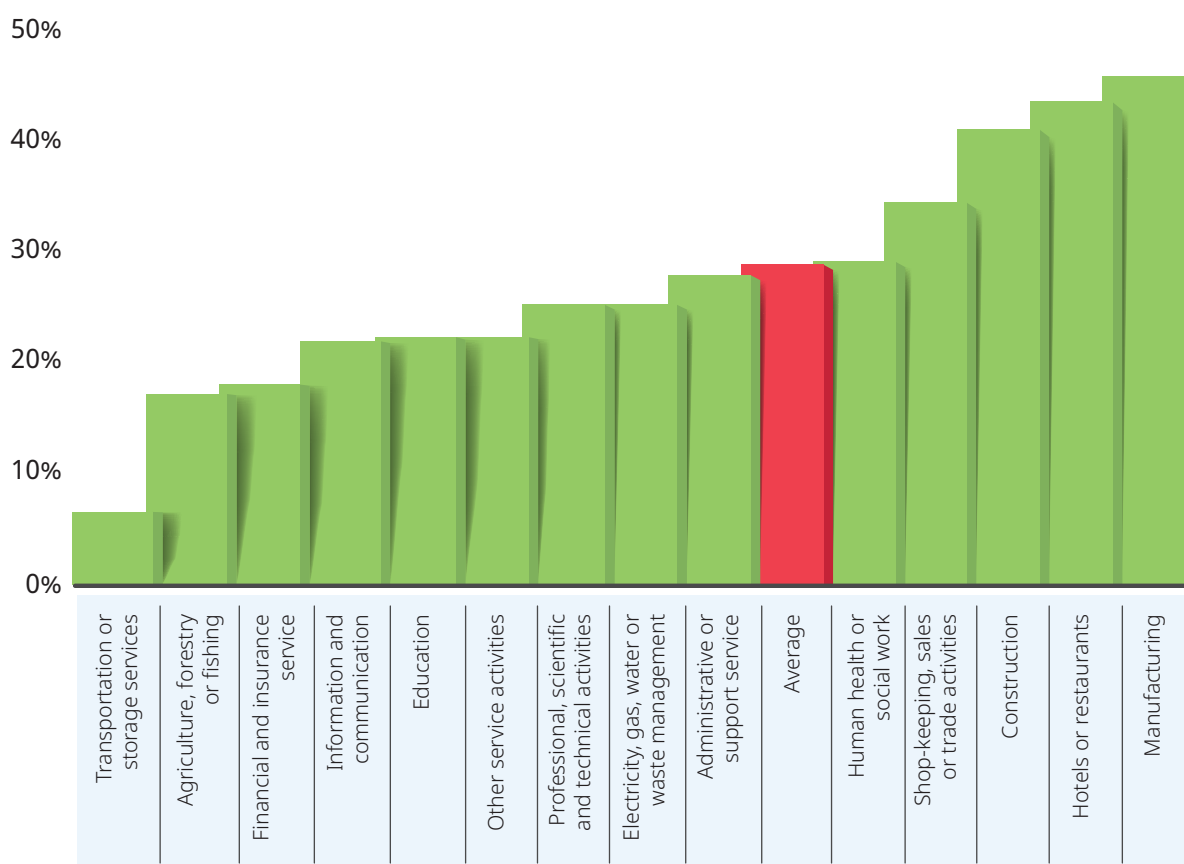
We introduced work shifts or rotation of workers over a period of time to avoid frequent physical contact.
-CEO, Agribusiness company in Tanzania



“Especially in the first lock down, there were conflicts among the team. Some didn’t want to go but of course the managers wanted some members to go back in to continue with the work. As there are some team members who are supposed to be physically present at the workplace and those are the people who operate the machines, we came up with an idea that they could do the work in shifts “
– Enterprise in Uganda

Another step taken by some enterprises has been the use of reduced hours contracts, or short-time working. This step, often implemented in response to pandemic-induced restrictions or changes in demand, allows employers to temporarily reduce the number of hours and pay of all workers in lieu of laying off a share of the workforce. The growth in these contracts was especially common amongst medium-sized enterprises, 43 per cent of whom increased their use of reduced hours contracts. The use of reduced hours contracts amongst micro & small enterprises barely changed – with 24 per cent decreasing their use while 25 per cent increased their use. Growth of reduced hours contracts was especially common amongst manufacturers, over 40 per cent of whom said they had increased their use during the pandemic. It also grew amongst enterprises in the hotels and restaurants and construction sectors – both of which were hit hard by the pandemic. Interestingly, reduced hours contracts were also very common in Uganda, where 53 per cent of enterprises used them, in comparison to just 22 per cent of enterprises across the rest of Africa.

Figure 23. Share of enterprises that increased their use of reduced hours contracts, by sector



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Another way that some enterprises have sought to increase their flexibility is by using contractors or external workers. About 19 per cent of enterprises reported that they had increased their use of contractors during the pandemic. This was fairly evenly spread across Africa, with countries seeing the share of enterprises use of this approach vary from 14 per cent to 28 per cent. However, this was partially offset by other enterprises – about 10 per cent – that decreased their use of external workers, perhaps to reduce costs during the pandemic.

Enterprises had a range of reasons for moving towards contract workers, but the two most cited are part of longer-term trends: the need for a more flexible workforce and the need for skills that are not part of the core business. The second of these – skills – was a theme that came up multiple times. For example, Ndimma Rawana, the head of human capital at PPC Limited, noted that they “need to do more renting in of capabilities. Just think of an area like decarbonizing,” she noted. “This is a critical task for industry” like PPC, a manufacturer and supplier of cement and materials with 3600 employees across six countries in Africa. “We don’t have all the necessary skills in-house to do that. I think we’ll need to borrow those skills,” she noted. This sentiment was echoed by Lee Naik, CEO of TransUnion Africa, who said, “there are skills we are

much better off by outsourcing. We just can’t do them as well or efficiently ourselves.” He noted the example of outsourcing of information technology engineering to India. “This means the service is on 24/7. They have the sort of shift system that means we can always get help, regardless of the time of day.” The main reasons why enterprises increased their use of contract workers were similar amongst enterprises of different sizes, though MSMEs were much more likely than large enterprises to cite “high worker costs” as a major reason.

As well as having more flexible and adaptable workforces, enterprises have also recognized and taken steps to build workforce resilience during the pandemic. Resilience is not only the ability to bounce back but to emerge from a crisis in a better position.²⁷ COVID has tested workforce resilience around the world. One pandemic-era study found that only 15 per cent of workers were “highly resilient”.²⁸ Enterprises and managers increasingly noted that they can take key steps to build resilience at their enterprises. One of those steps is simply to keep “workers informed about organizational challenges and the near-term future of the business.” This exchange of information has proved vital during the pandemic, and is the focus of Trend 8 on Social Dialogue.

Box 3.

The Drivers of Contractor Use at South African Multinational PPC Limited



The growing use of contractors has many drivers. Ndimma Rawana, the head of Human Capital at PPC Limited, notes that one of the reasons that they are increasingly looking towards human resources beyond just their workers is the increasingly dynamic and diverse skills needs of their enterprise. Rawana spends significant time on workforce planning at PPC Limited, a Johannesburg-based manufacturer and supplier of cement and materials that operates across six economies in Africa. He insists the current model needs to adapt to allow more flexible approaches.

Rawana notes:

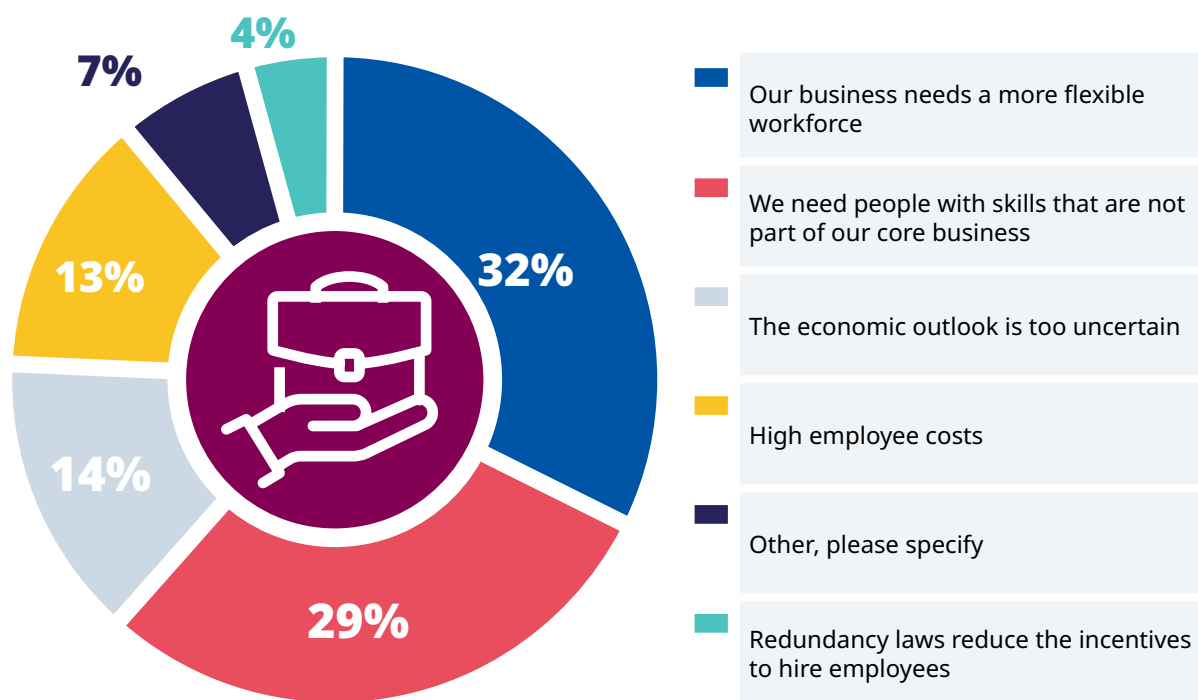
“This model has to change. We are too rigid. The traditional approach has said that there are three ways to obtain a skill: build, borrow or buy – the ‘three Bs’. This must be applied more fluidly than ever before. We need to do far more renting in of capabilities. Just think of an area like decarbonizing. This is a critical task for the industry. But we don’t have all the necessary skills in-house to do that. I think we’ll need to borrow those skills.”



Photo Credit | Pexels-august-de-richelieu-4427957



Figure 24. Most important reason that an enterprise expanded its use of external workers



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Closely related to the need to build resilience are the mental health challenges facing workers. These challenges are closely tied to the disruption and isolation—both in personal and professional lives—that has been brought about by the pandemic. One study found that mental health and wellbeing have eroded significantly – with half of workers reporting having less energy and a third using

more alcohol or illicit substances than usual. Workers can take some steps to address their mental health, such as keeping to a schedule or trying to connect with friends and family. However, employers have an important role to play, showing empathy, communicating with workers, and marshalling other resources, such as mental health professionals, to support them.²⁹



Photo Credit | Marcel Crozet-ILO Photo News



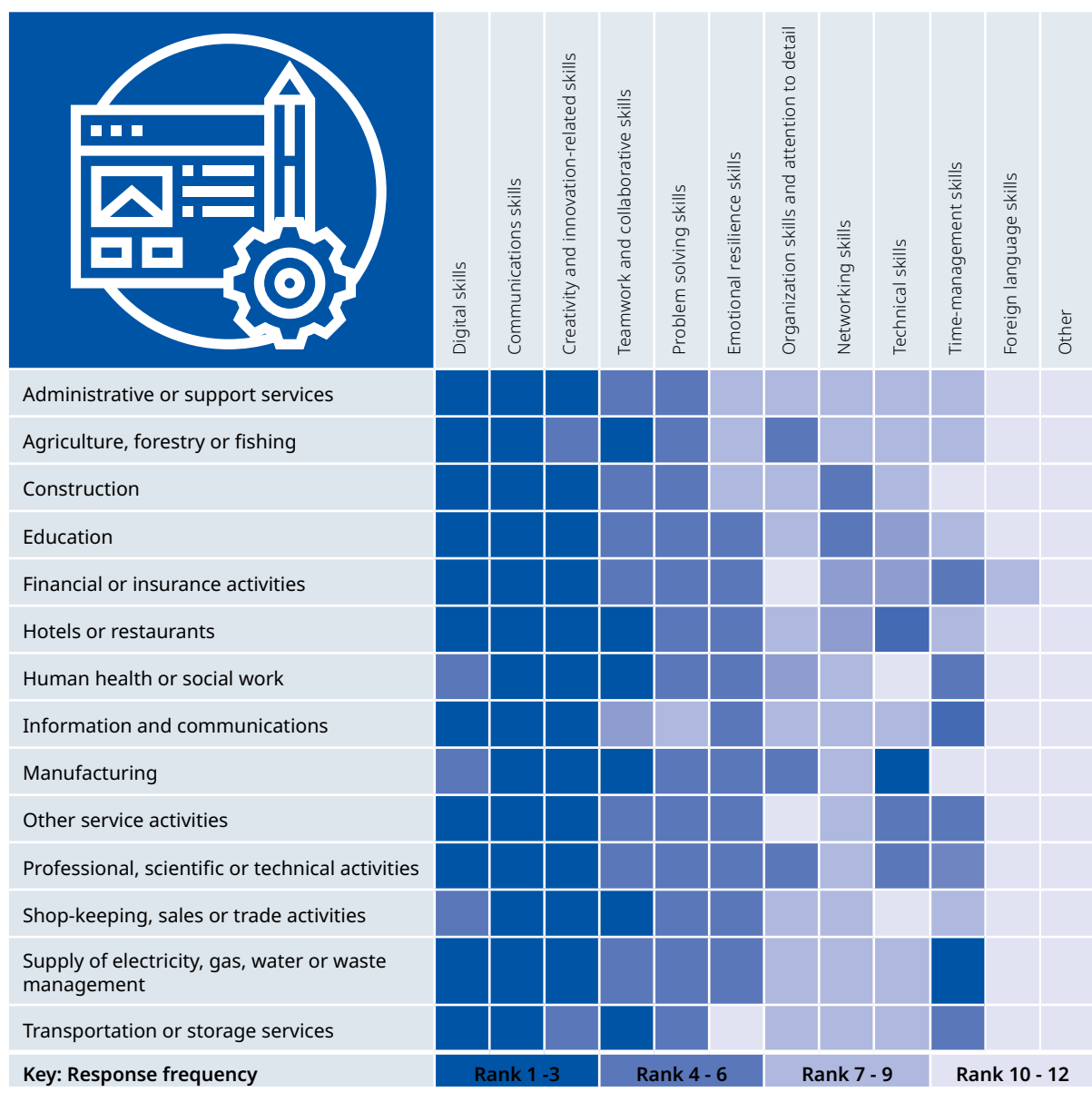
TREND 6: Digital, communication, innovation and teamwork skills are now top priorities for enterprises



The changing nature of work during the COVID-19 pandemic has further underscored the longer-run trends in the skills needs of enterprises. Survey respondents overwhelmingly highlighted four different types of skills as being vital to their future success: digital skills, communications skills, creativity and innovation-related skills and teamwork and collaborative skills. More than 40 per

cent of enterprises cited each of these skills types as a top-three need in the future. Other studies have also found that similar types of skills will be vital in future workplaces. For example, a report by McKinsey & Co. found that the four sets of skills that will be increasingly important in post-COVID workplaces: digital, cognitive, social and emotional, and adaptability and resilience skill sets.³⁰

Figure 25. Top three skills sets that are most important for the future success of your business, by sector



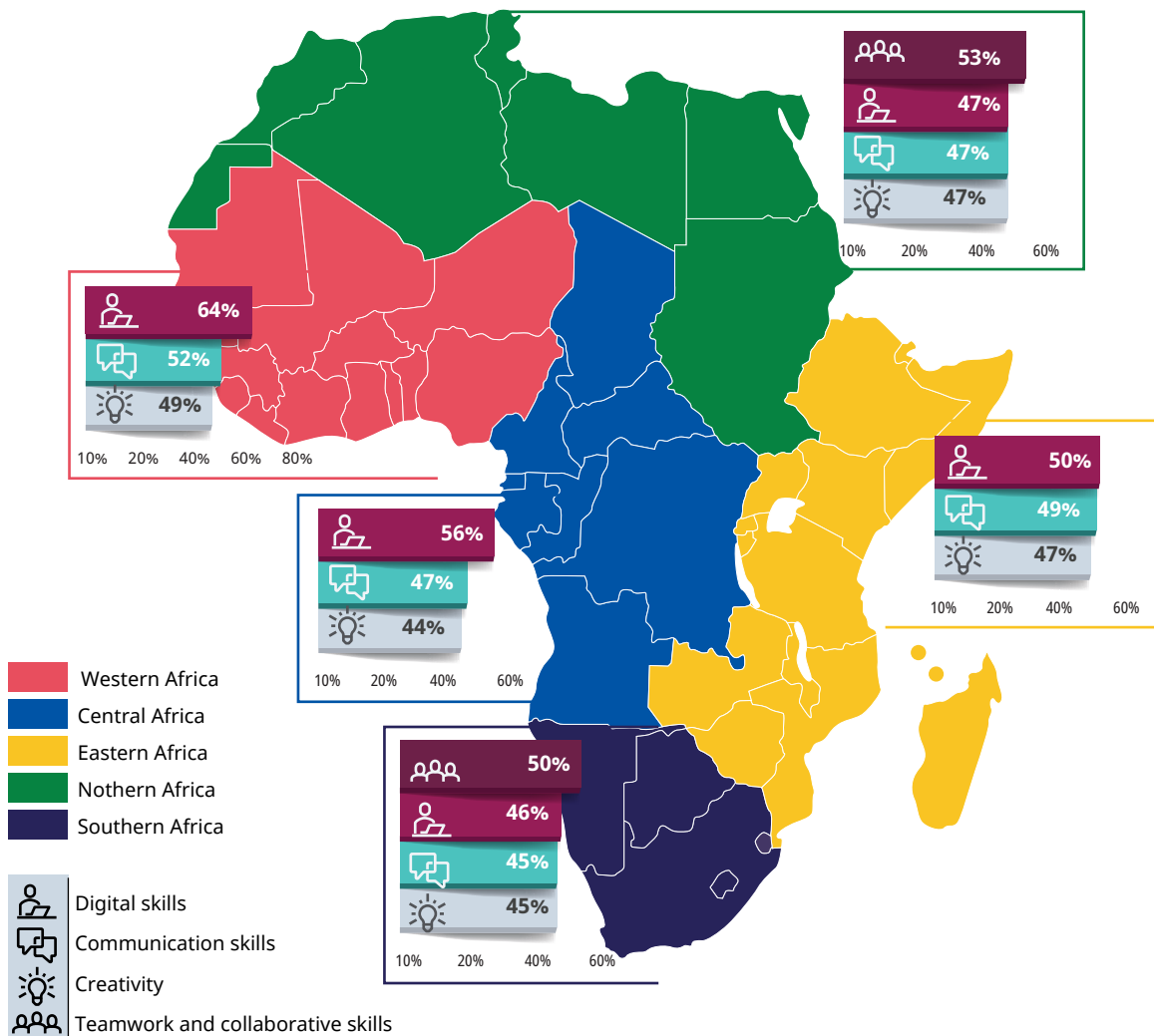
Source: ILO ACTEMP Survey of Enterprises in Africa, 2021



“Although core technical skills of workers are still useful and important, IT skills are more important now as most enterprises have digitised their operations. Remote and online working require IT skills. Many staff, especially lower-level staff...need to upscale their skills in this area. In this regard, government must engage in re-tooling and re-skilling of its staff, while labour unions must do same for their members”. - Enterprise in Nigeria

One of the most important trends, evidenced in our survey, interviews and numerous other studies, is the increase in demand for digital skills. More than half of surveyed enterprises in Africa – 53 per cent, to be precise – said that this was one of the three most important skill sets that they needed in the future. The demand for digital skills was particularly strong in education and professional and scientific activities, though at least 30 per cent of enterprises in every sector said that it was one of the top three skills they needed. Demand for these skills was also particularly strong in Western Africa, especially Ghana, where 72 per cent of the surveyed enterprises cited this as a top-three need.

Figure 26. Top three skills sets that are most important for the future success of your business



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

“All skills are important but we have noticed that digital skills, communication and innovation skills are more important particularly in the recent pandemic. Workers who possess these skills are currently considered one of the most important assets.”
- Enterprise in Tanzania

Communication skills were also one of the most commonly cited skill sets that enterprises need in the future. Interestingly, the need for communication skills appears nearly universal. Enterprises in every single sector cited communications skills as one of their top three areas of need. This is not a surprise, given the importance of communication across all types of work. Three of Africa’s five regions also cited communications skills as the single most important skill set that they will need in the future. Creativity and innovation skills were similarly in demand, with 48 per cent of all enterprises citing this skill set as one of the three most important for their future success. These skills are in high demand across a broad range of sectors and were a top three skill set need across every region in Africa.

Lastly, enterprises noted the importance of teamwork and collaboration skills as one of the most important sets of skills they need in the future. This was especially true for enterprises in Central and Southern Africa, and for enterprises that had a significant in-person aspect to their business, such as manufacturers, transport and storage enterprises, and retail and wholesale traders.

While all of these individual skill sets highlight important needs, enterprises also regularly note that the most valuable workers are those with a range of complementary skills. Skill sets are often very complementary – think, for example, of the benefits of having both digital and communication skills, enabling a worker to effectively work remotely in a range of roles. This complementarity between different types of skills was highlighted by an interviewee from TransUnion Africa, who notes that there is a need for a new way of approaching work

“We needed people who see challenges as opportunities, people who see a challenge and immediately think of the solution or come up with solutions.”
- Enterprise in Uganda

skills. Workers must be equipped with a range of skills and resources, including technological resources, the skills to use them and the softer skills needed to maximize their benefit, such as time management. They commented: “In this future workplace, creativity and analytics are key ... But there are lots of softer skills that are increasingly important. “

“Our hiring is most likely to change going forward, with preference being given to multi-skilled individuals”.
- Enterprise in Eswatini

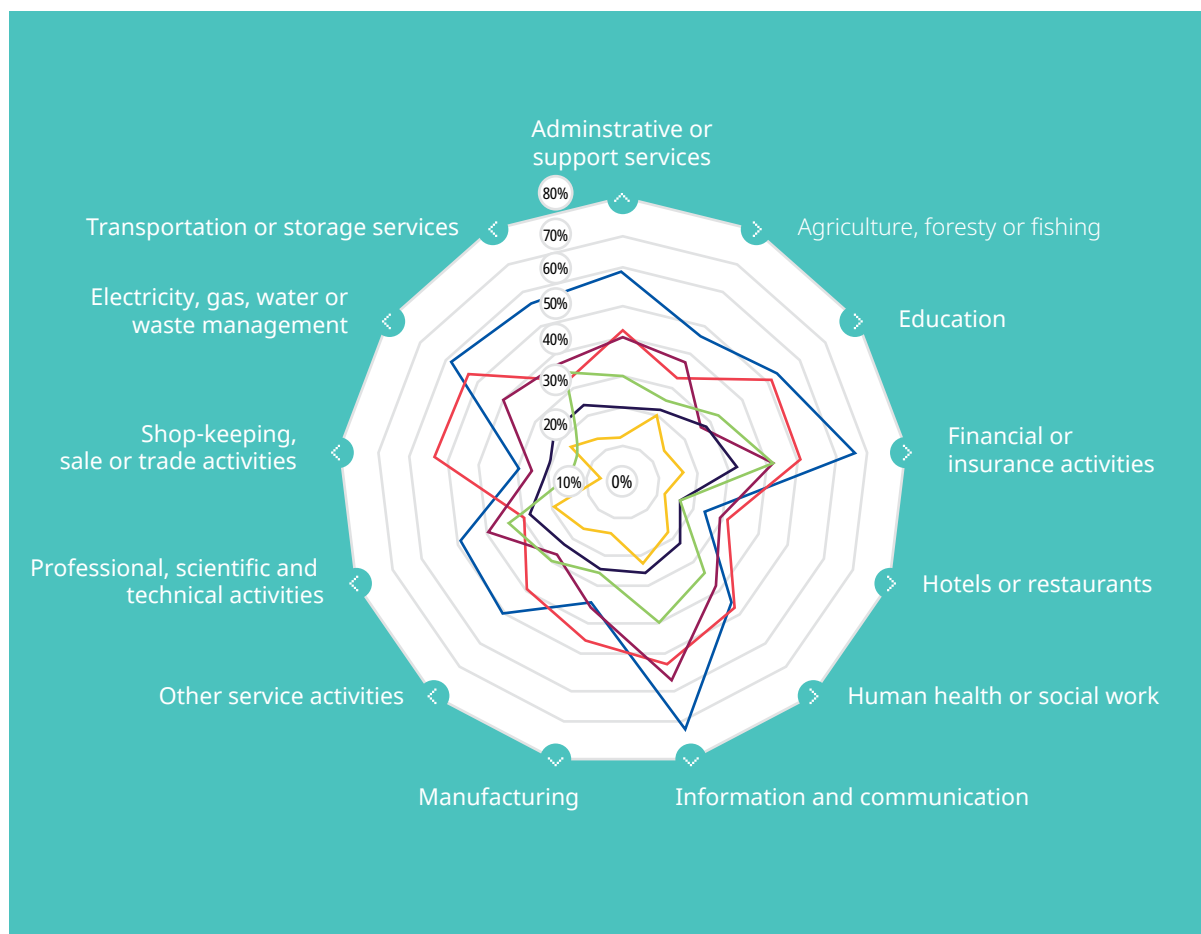
The changing skills needs of enterprises look set to have a long-run effect on the types of work available, with a shift away from low-wage and low-skilled occupations. A McKinsey study found that the pandemic has hit many low-wage workers especially hard, and that more than half of them may need to “shift to occupations in higher wage brackets and requiring different skills to remain employed.”³¹ This structural shift only heightens the skills-related challenges facing workers and enterprises in the future.



The changing skills needs of enterprises have been accompanied by changes in the ways that enterprises train, share knowledge and collaborate. Changes in work modalities, especially the rise in remote work, has created new challenges for enterprises as they strive to recreate in-person engagements in the digital world. While remote work has not affected productivity in some areas, a few studies have suggested that it has

presented challenges in “areas such as innovation and commencing new projects.”³² It has also affected some aspects of staff development, such as mentorship and coaching, that were done in the physical workspace. Studies have similarly suggested that these too have been “identified as being more difficult when people are working remotely, a challenge especially acute for young staff who need this to develop.”³³

Figure 27. How have you changed the ways in which you train, collaborate and share knowledge during the pandemic?



- We have new digital training courses for employees
- We have employee development plans that reflect the new ways people are working in the pandemic era
- We have a new digital plan to share big picture team and organizational strategies
- We have a new digital plan for managers to communicate daily priorities to employees
- We have designed and implemented casual digital interactions
- We have designed and implemented purposeful digital collaboration sessions

Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

One of the most prevalent changes to training and collaboration has been the growth of digital training courses, which have been broadly adopted – by over 50 per cent of enterprises we surveyed. New worker development plans were also common. On the flip side, few enterprises created casual digital interactions – less than one in five. These interactions can be beneficial not just for worker morale and relationship building, but also for productivity.

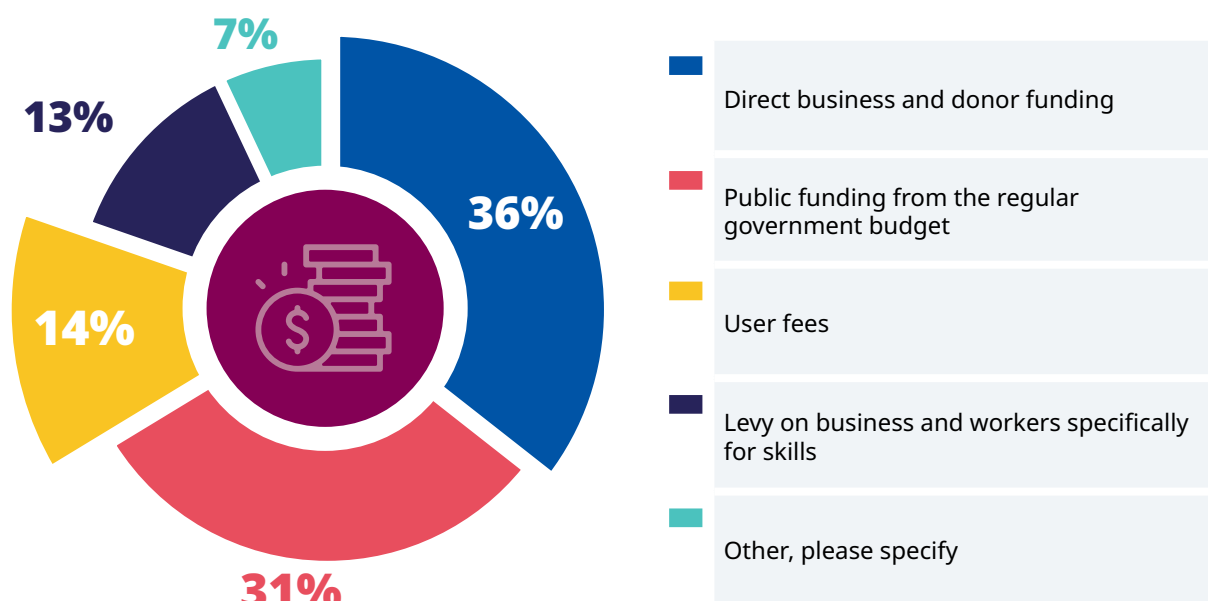
For enterprises, it is essential that they play an active role, in the context of shared responsibility among employers, workers and governments, in helping reskill and upskill their staff. In many labour markets, there are shortages of individuals with these newly-important skills. Beyond that, evidence shows that there are benefits from reskilling current staff, as it “typically costs less and brings benefits that outweigh the costs” of reskilling, when compared to trying to find staff from outside the organization.³⁴ This commitment to reskilling can also foster improved perceptions of a business and foster worker loyalty.

One challenge that enterprises face when reskilling and upskilling staff is the cost associated with this investment in human capital. The cost is both direct – in the financial cost of training, if any – as well as indirect – in lost working time. However, the benefits for both enterprises and workers can be significant, in terms of increased productivity. Enterprises note that the most suitable models for funding

were either direct funding from enterprises or donors or public funding from the regular government budget. Few enterprises supported a levy or further increases to existing levies on enterprises and workers specifically for skills development. This could be a reflection of the employers’ sentiment that the skills levy system in Africa has not been working effectively for various reasons. A recent ILO study of eight skills levy funds in Africa provides some evidence of this, finding that levy funds provide a comparatively little funding back to employers for training. It also found that some funds have high administrative costs, notably Malawi’s fund which spent 41 per cent per cent of revenue on administration, while many funds had excessive levels of unspent surplus, up to 58 per cent of the collected levy (Zambia).³⁵

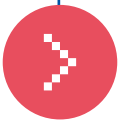


Figure 28. Most suitable model for funding post-pandemic skills development



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021





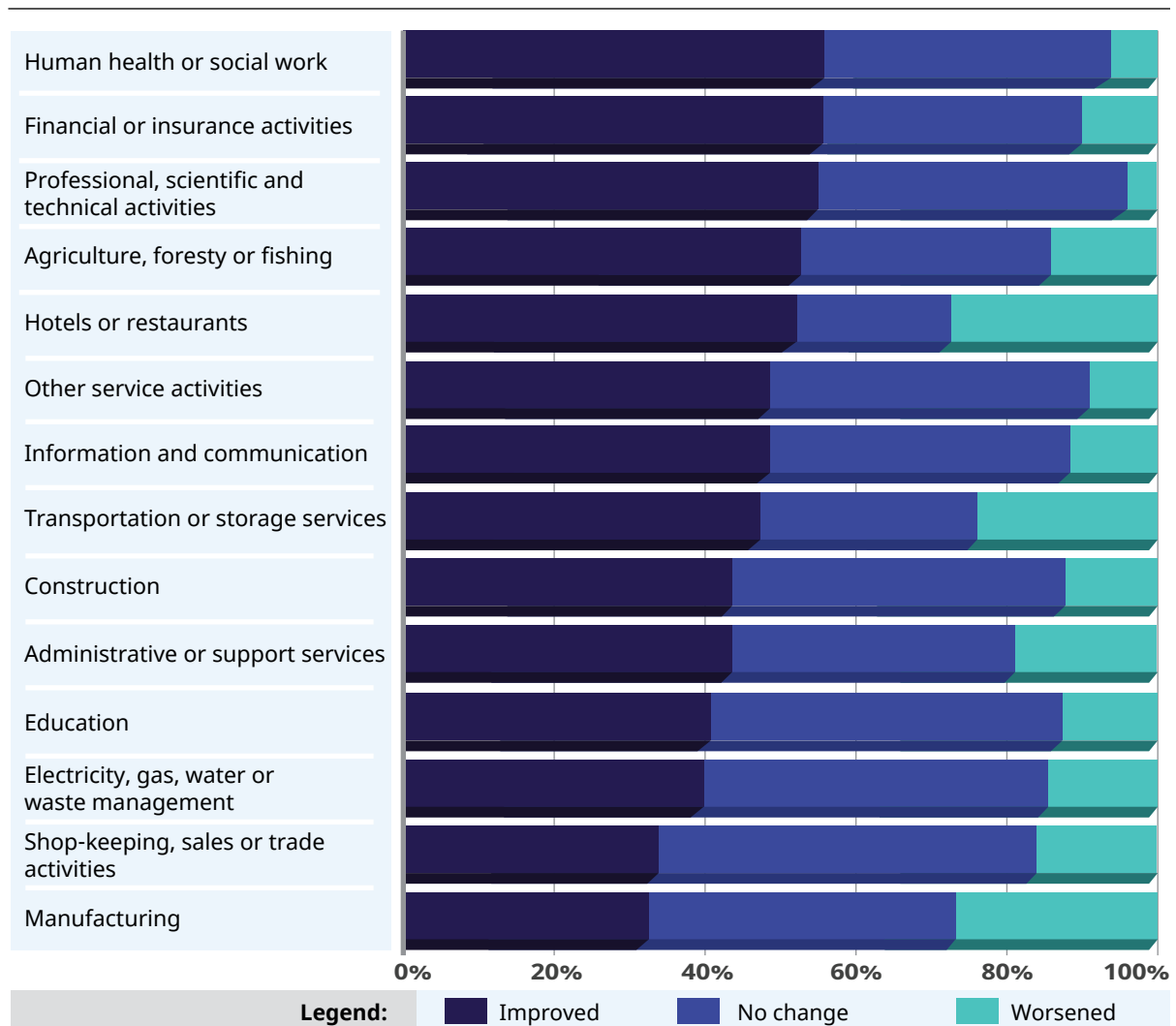
TREND 7: Productivity has improved or remained constant at most enterprises



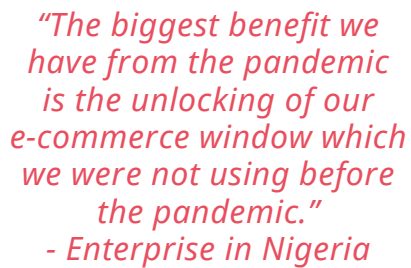
The COVID pandemic has brought a host of challenges for Africa's enterprises, but amidst this there have also been unexpected surprises. Perhaps no silver lining is more evident than how these challenges have forced enterprises to find new ways of working – and inadvertently contributed to productivity growth for a significant share of them 46 per cent of the enterprises we surveyed said that COVID-related changes to their workplace resulted in productivity gains, with another 39 per cent saying that production efficiency had stayed the same. While our data is not necessarily representative of all enterprises in Africa, it suggests that many formal sector workplaces have benefitted

from these changes. Other studies echo this finding. For example, a study covering developed countries found that as high as ninety-four percent of employers found productivity was the same as or higher than before the pandemic.³⁶ Productivity gains were especially common amongst service enterprises. Manufacturers, on the other hand, were the least likely to report that the pandemic had contributed to improved production efficiency, and the most likely to say that it had worsened that efficiency. While medium and large enterprises were somewhat more likely to say their productivity had improved, micro & small enterprises were somewhat more likely to report no change.

Figure 29. Effect of changes to the business premises on production efficiency, by sector




Source: ILO ACTEMP Survey of Enterprises in Africa, 2021




*"The biggest benefit we have from the pandemic is the unlocking of our e-commerce window which we were not using before the pandemic."
- Enterprise in Nigeria*

There are a range of factors driving productivity growth, perhaps none more important than the pandemic-induced push to find digital processes to replace analogue ones. For some enterprises, this means engaging with customers digitally. A McKinsey survey published in October 2020 found that companies are three times likelier than they were before the crisis to conduct at least 80 percent of their customer interactions digitally.³⁷ This is exactly what happened at many enterprises we met. For example, one medical equipment supplier in Uganda noted that they were able to shift over a significant amount of their work to remote and digital methods. They noted that most of their client interactions are through quotations and invoices and because of the nature of their business they were able to switch to operating in a way where "the physical interactions are minimal." For others it means digitization of processes.



*"We moved away from measuring work in terms of time. The model we pursued (was) output based through mini-projects."
- Enterprise in Uganda*



Other factors also contributed to the increase in productivity. Many enterprises reorganized their physical workspaces in light of pandemic-related health concerns, but through this sometimes found more productive ways to organize workspaces. For some workers, especially remote workers, COVID also led to longer hours worked, which may increase per-worker productivity (though not necessarily productivity per hour). This challenge was cited by Mondelez Africa, a multinational food and beverage company with operations in five countries in Africa, who noted that it was a side-effect of their "MS Teams revolution". "People from head office started working much longer hours," explains Chaibva-

King'ori of Mondelez. "It became hard to switch off. One really must plan and make sure you have a workspace and a home place."

Lastly, many enterprises noted that increased worker dedication and effort was a key factor driving growth in productivity. Many enterprises lauded the effort of their workers, and noted that the shared adversity helped rally employers and workers behind a common cause. "We were pleasantly surprised," notes Ian Lourens of OneLogix Group. "People adapted quickly and took the safety protocols seriously. In fact, we improved productivity. Everyone knew it was difficult for all of us, and the teams pulled together. That is testament to the quality of our people."

The gains in productivity that have been experienced by many enterprises are being accompanied by significant changes in the ways enterprises think about and measure productivity. Many managers have long held views of performance that focus on "time on the clock" in lieu of more accurate measures of productivity.³⁸ However, remote work has changed the ability of enterprises to monitor this, a challenge compounded by concerns around privacy and worker desires for flexibility. Measuring hours at the workplace is no longer feasible when workers do not come to the workplace. Instead, organizations "will increasingly focus on work done instead of hours worked."³⁹ This makes new tools to manage the performance of remote workers even more important.



*"For the HR department for instance we now assign work in the form of projects for our staff. They report on progress made on these mini projects."
-Enterprise in Eswatini*

Enterprises of all sizes have been rethinking productivity. About 80 per cent of enterprises in each size category - large, medium and small & micro - responded that they had rethought productivity measurement since the start of the pandemic. Similarly, this shift has come from all sectors. Even five out of six manufacturers, many of whom still rely on in-person work where traditional productivity measurements could still work, have reported that they are rethinking productivity measurement in the COVID era.

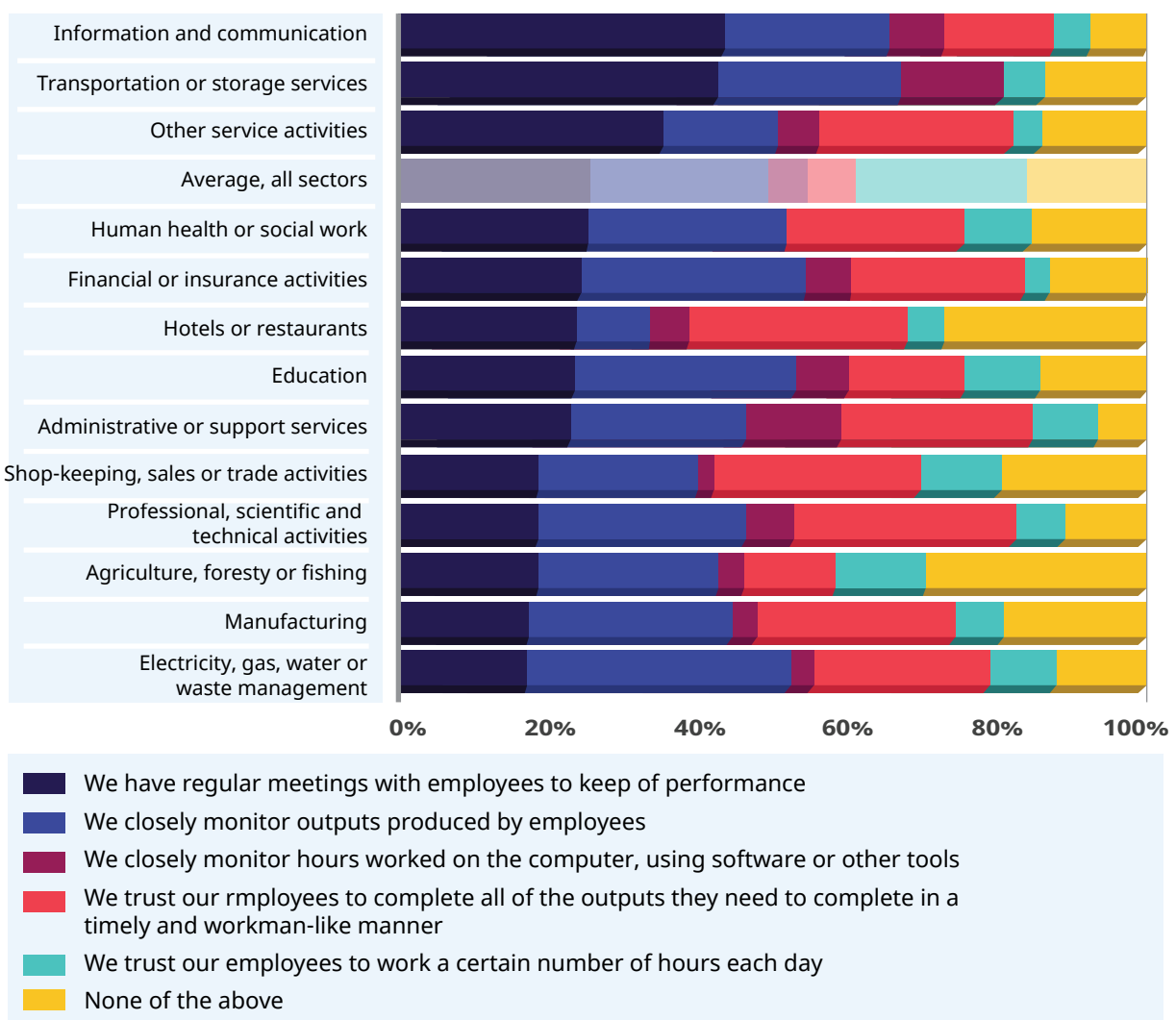


*"We now create new monitoring policy and sensitize workers and managers – line managers have to follow-up trying to ensure performance is monitored with workers sending their work report daily and weekly".
-Enterprise in Nigeria*

*"We set up a system whereby every worker and their supervisor have a weekly check-in to review what has been done that week, what needs to be improved and what are we focusing on next week. We moved from the long-term kind of planning to short term."
-Enterprise in Uganda*

Enterprises are increasingly focusing on outputs as their key measure of productivity. When asked if the changing nature of work made a business focus on outputs as the key measure of productivity, 81 per cent agreed, and only 3 per cent disagreed. This approach was least common among hotels and restaurants, but even there about two thirds of enterprises reported an increased focus on outputs, despite challenges associated with measuring outputs for some jobs in these sectors.

Figure 30. Which of the following statements best describes how you monitor the performance of remote workers during the pandemic?

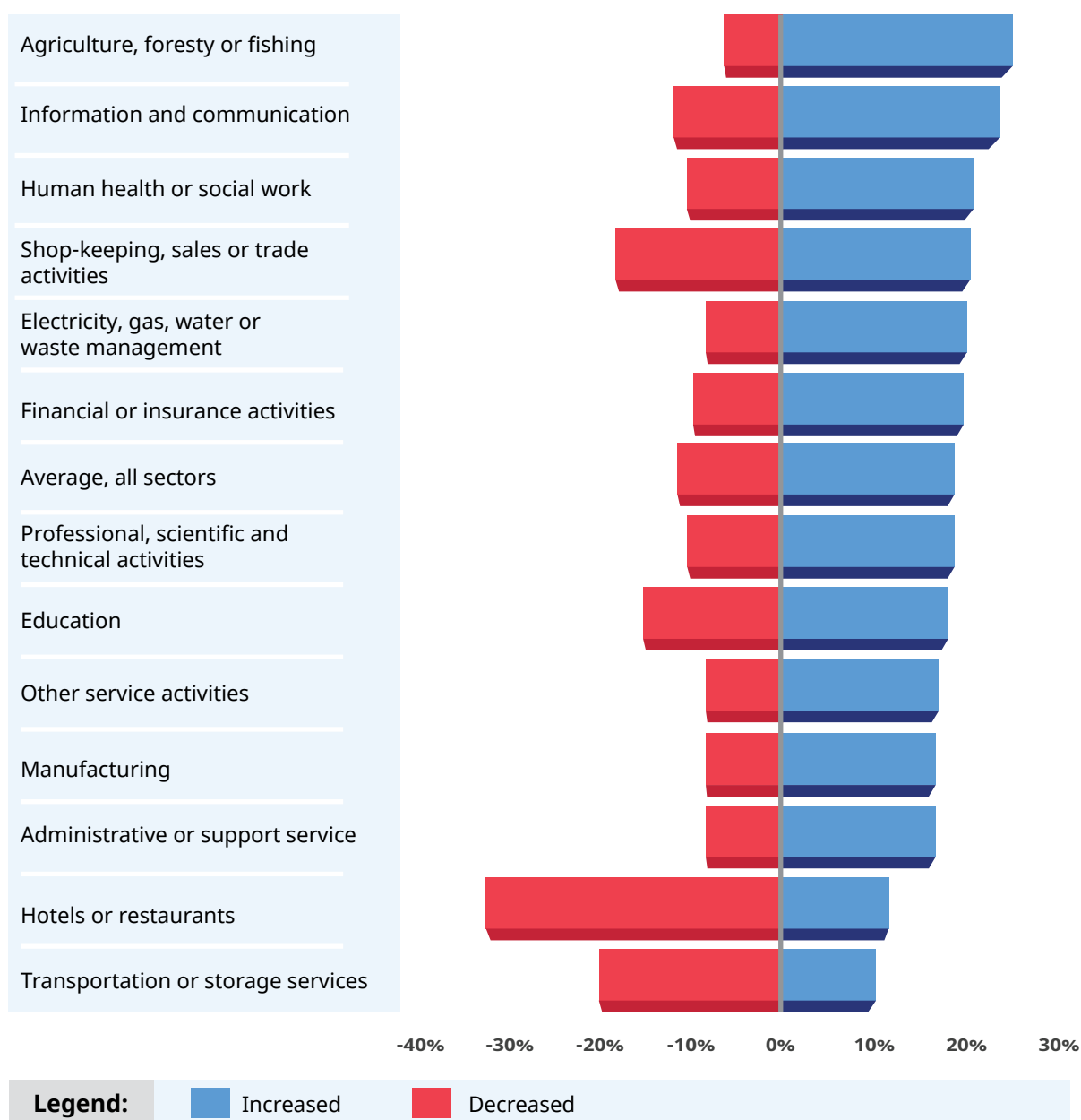


Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Enterprises use a range of methods to monitor performance, but perhaps the most notable finding here is the methods enterprises use the least. Only one in eight enterprises focused on measuring hours. Despite some fears about the use of invasive software to monitor workers becoming common, only 7 per cent of enterprises said that they tracked time worked through software or other tools. Another 5 per cent said they trusted workers to work a certain number of hours each day. The most common approach to performance monitoring was regular meetings with employees, which was especially popular in a few sectors, notably information and

communications. Another common approach was the close monitoring of outputs, used by one in four enterprises. This approach was most common in the electricity, gas, water and waste management sectors, though much rarer in other sectors such as hotels and restaurants. Another 25 per cent of enterprises said that they trusted workers to complete all of the outputs they need to complete in a timely and workman-like manner. Notably, there were not major differences in performance monitoring practices between local and foreign-owned companies, nor of women-led companies versus others.

Figure 31. How has your use of performance-based pay changed since the COVID-19 pandemic?



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021



Though the vast majority of enterprises have rethought productivity and performance during the pandemic, the growth of performance-based pay—which links some or all of an employee’s compensation to their performance against stated criteria—has been modest. This suggests that employers are yet to fully integrated new thinking about performance into action. Its use did increase across many sectors of the economy, including in agriculture, information and communications and health, other sectors saw a decrease in the use of performance-based pay – most notably at hotels and restaurants. However, the structure of wages may be slow to adapt, so continued growth in the use of performance-based pay remains possible. In both our interviews and survey, we find that changes in the way African workplaces reward productivity are better described as modest than revolutionary.

Despite the often-positive story around productivity and performance gains during the pandemic, not all enterprises have had positive experiences, and challenges remain abundant. Enterprises note that there are inherent challenges in monitoring remote workers, and that solutions are not always easy. “It is now common cause that a person can miss a meeting and cite connectivity challenges as the reason,” said a business manager from Eswatini. “Because we are not in the same space, we cannot be sure of the authenticity of that excuse. So we are most likely losing value which we would have otherwise retained if the person was physically at work.” Many employers are still struggling with the immense challenges of moving from work cultures that encourage performance through presence, to one that values outputs. Monitoring performance in the world of remote work especially presents new puzzles.





TREND 8: The pandemic has deepened gender inequality at work



Gender inequality at the workplace, and economic opportunity for women more broadly, have worsened both globally and in Africa due to the COVID-19 pandemic.⁴⁰ The divide between men and women has been on full display since the start of the pandemic. In South Africa, for example, two-thirds of the estimated 3 million workers who lost their jobs following the economic shutdown in 2020 were women.⁴¹ Women's employment has dropped faster than average, even after accounting for the differences in sectors of work, with men and women clustering in different occupations.

The reasons for the differential impacts and the deepening gender inequality are many and complex. One of the most important is that the burden of unpaid care work has disproportionately fallen to women and has only increased due to school closures.⁴² Many women have left the workplace because COVID-19 has made it impossible to reconcile work requirements with homebased and unpaid care responsibilities. Many enterprises noted this strain, for example in the mining sector in South Africa, where employers reflect on the additional workload and home pressures faced by women, largely as a result of children being at home. Similarly, in the agricultural sector, employers indicated that women left the workforce in huge numbers, particularly in rural areas where they had a triple burden of households, education and work. Women often were especially affected by the negative effects of lockdowns.

Besides the home-based responsibilities that women disproportionately bear, a number of other drivers also shape the growing gender inequalities at work. Women are more likely than men to hold temporary and part-time positions which are often the first to be laid off in a downturn. According to a 2020 McKinsey study, women's jobs are nearly twice as vulnerable than men's jobs.⁴³ Women are also more likely to work in the sectors that are hardest hit by lockdowns and

restrictions, such as leisure, hospitality, and retail. Lastly, there are more female workers in front-line and high-risk sectors in Africa. For example, in Southern Africa, 41 per cent of women work in high-risk sectors, with another 19 per cent working in medium-risk sectors.⁴⁴ Across all of Africa, 70 per cent of health workers, a vital but high-risk front-line occupation, are female.⁴⁵ The effects of the pandemic, and these key factors that shape the effects on women, clearly show how women's jobs and livelihoods are more vulnerable due to the pandemic.

The effects of the pandemic have also contributed to an increase in other employment-related risks that have disproportionately affected women. One of the most notable is that working from home has increased the rates of gender-based violence and harassment, including domestic violence, which before the pandemic affected about one in three women globally. Data from many countries indicated a marked increase in gender-based violence and harassment since the onset of the pandemic. For example, early data from the United Nations Population Fund showed a drastic 775 per cent increase in calls to the national hotline in Kenya during the pandemic.⁴⁶ In a 2020 speech, South African President Ramaphosa said that around 51 per cent of women in the country have experienced violence at the hands of their partners and that cases spiked considerably during lockdowns.⁴⁷ Notably, data from the retail sector in South Africa echoed this trend, with a significant increase in employees accessing employee assistance program helplines, particularly in reference to gender-based violence and harassment, alcohol abuse, and suicide.

Besides increasing gender-based violence and harassment, women have experienced increased exposure to other types of risks because of the pandemic. One example, which is especially applicable to low-earning women, was the higher level of reliance on public transportation. This transportation had restricted hours and



The effects of the pandemic have also contributed to an increase in other employment-related risks that have disproportionately affected women



presented a greater risk of a COVID-19 infection. The public transport challenges are more likely to impact negatively on people living far from work, constituting a type of indirect discrimination against women and poorer people. Women commuters, who ordinarily would travel in groups, had less 'safety in numbers' and are potentially exposed to higher risks.

The effects of the pandemic on women in Africa are only exacerbated by the challenging conditions women faced before the pandemic

started. Research from the ILO showed that even as recently as 2018, African women were more likely to be employed in low-skilled occupation and face worse working conditions than men. Women are more exposed than men to informal employment in over 90 per cent of sub-Saharan African countries – higher than the levels in either Southern Asia (89 per cent) or Latin America (75 per cent). Africa also had a low level of women in management – 19.7 per cent – and in Sub-Sahara Africa, the highest level of women in informal employment.

Figure 32. Views on the question, “Do you feel included at work?”

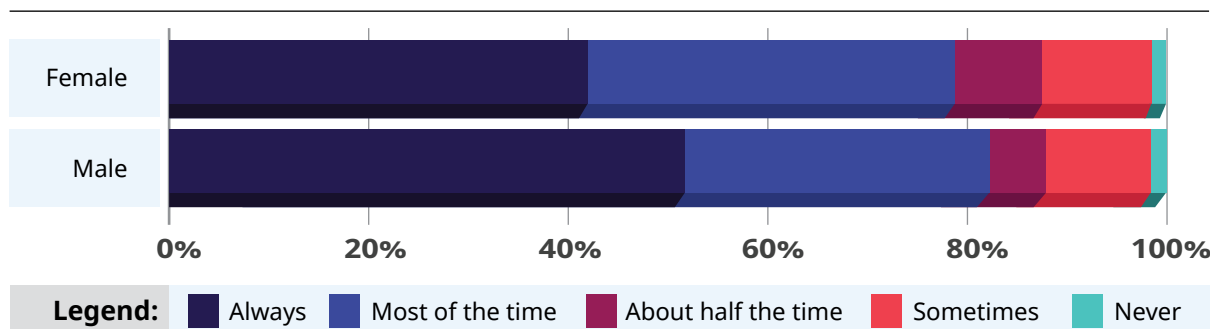


Figure 33. Views on the statement, “I’m confident that if I speak up about inappropriate workplace behaviour (including discrimination, harassment, or violence) that it will be acted upon in a timely and confidential manner”

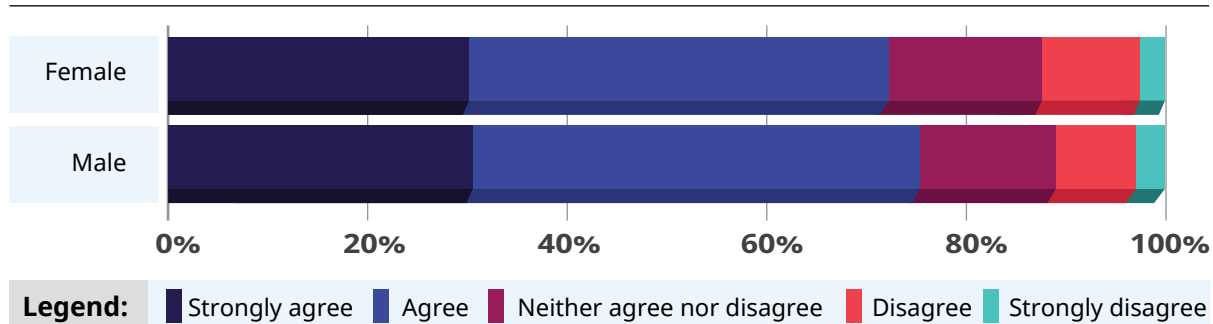
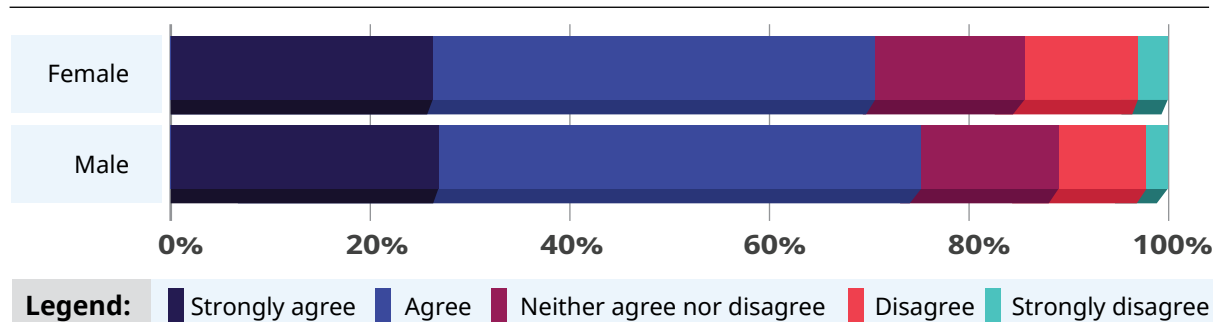
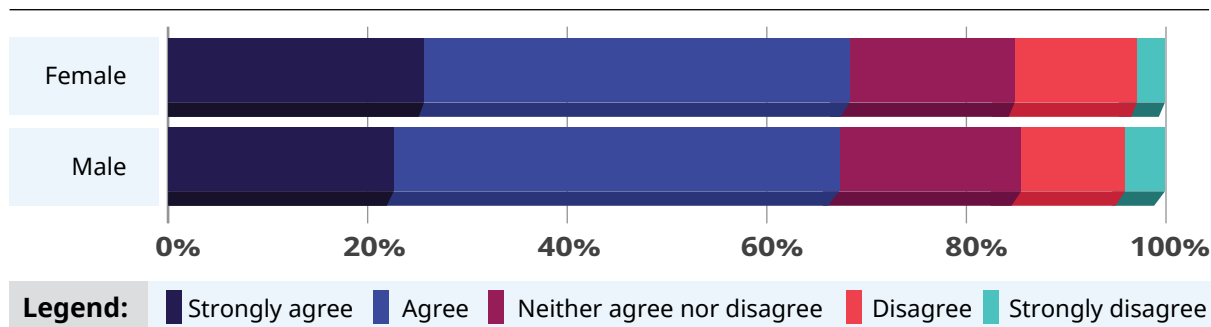


Figure 34. Views on the statement, “I feel supported to work flexibly in time and/or location when it fits with both my own and my company’s needs”



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Figure 35. Views on the statement, “I’m encouraged and supported to advance my career”



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Women also have somewhat different views about diversity and inclusion in workplaces in Africa when compared to men. When asked for a forthcoming ILO study entitled “Transforming enterprises through diversity and inclusion” whether they feel included at work, a significantly higher share of men (52 per cent) respond with “always”, in comparison to just 42 per cent of women. Notably, the negative response rates from men and women, who say they “never” or only “sometimes” feel included at work, are comparable. Women also tend to have somewhat more negative responses than men when asked whether they were confident that inappropriate workplace behaviour (including discrimination, harassment, or violence) would be acted upon in a timely and confidential manner, or whether they felt supported to work flexibly in time and/or location when it fits with both my own and my company’s needs. Interestingly, women responded in a somewhat more positive

manner than men when asked whether they felt encouraged and supported to advance their career.

“With or without COVID 19, we know that women enjoy less opportunity than men as a matter of course in the economy... the real issue is whether you believe in diversity and practice what you preach.”
 -Senior Executive, South African Pharmaceutical Company

Changes in the workplace and labour market driven by the pandemic may have important implications for inclusion and diversity, and it is essential for enterprises to make special efforts in this regard. It is important that women and other disadvantaged groups get “equal access to new digital forms of education and training” at the workplace. A failure to do so could not only result in fewer women in the workforce and exacerbate pay disparities, but could also lead to a significant talent gap that results in lower performance of the enterprise.⁴⁸ When assessing working performance when working from home, it would be important to consider each worker’s unique circumstances. For example, some

workers have childcare duties while others have small or crowded living spaces which could affect their work. Considering these circumstances in performance assessments would help ensure that workers with these circumstances are not disadvantaged.⁴⁹ Generally, enterprises may find it beneficial to create a neutral and safe environment for all workers, where harassment can be reported in a sensitive and confidential way, as it could engender a harmonious, inclusive and productive workplace. This may include putting in place a system for anonymised disclosure with a commitment to investigating all sexual harassment allegations.



It is important that women and other disadvantaged groups get “equal access to new digital forms of education and training” at the workplace.





TREND 9: Social dialogue has been reinvigorated during the pandemic



The COVID-19 pandemic changed aspects of business and employment with unprecedented speed and on an unprecedented scale. Though the changes were significant and often challenge, many enterprises said that they contributed to an improvement in the relationship between enterprises and their workers. About 37 per cent of enterprises said that their labour relations had improved during the

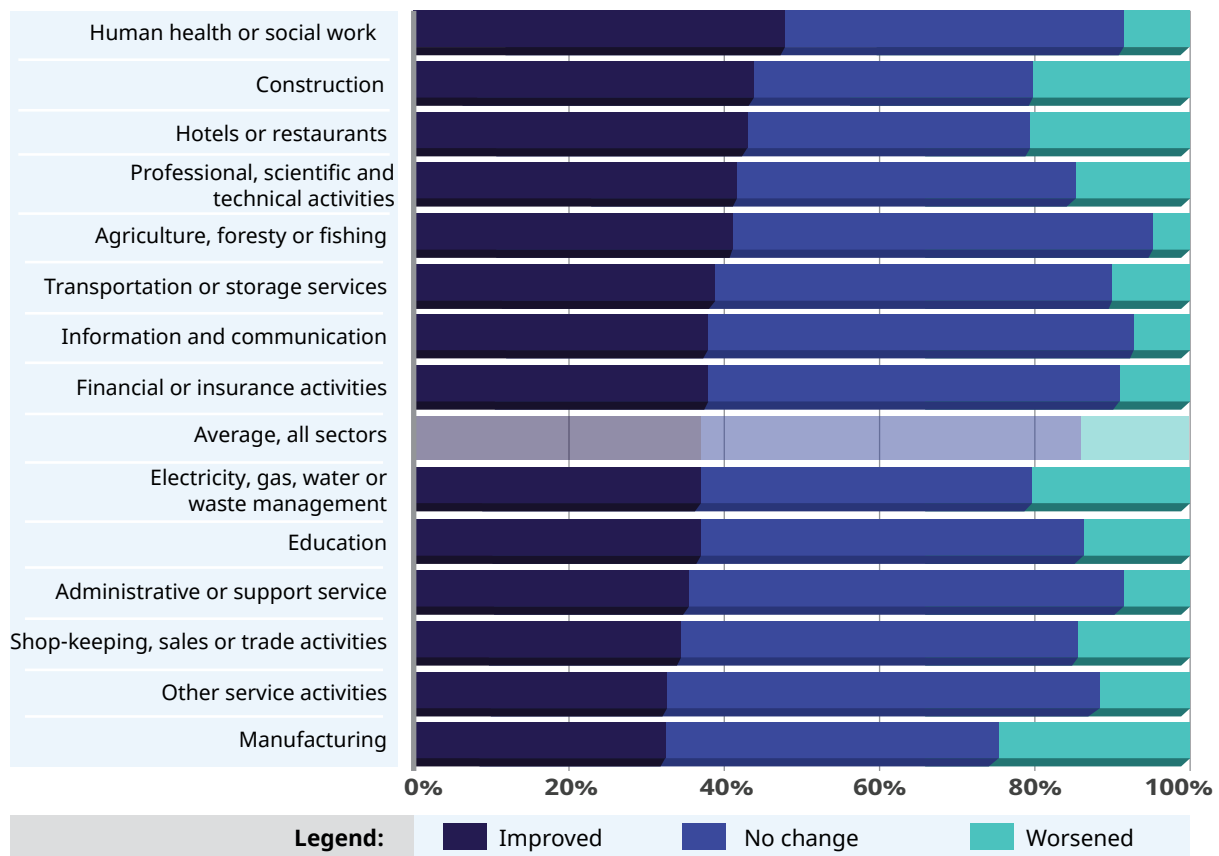
pandemic, whereas only about 14 per cent of enterprises said they had worsened. This is likely because the pandemic – an outside force beyond the control of either management or workers – unified these groups against a common outside enemy. The survival of the business and the sustainability of employment faced a shared challenge, giving these groups a common cause that helped improve labour relations.



“The uncertainty and the anxiety have been real for workers. On the one hand they are worried about contracting the virus and on the other they are worried about what the Covid measures mean for their jobs.”
– Enterprise in Eswatini



Figure 36. Change in the relationship between senior management and other workers at your workplace due to the pandemic, by sector

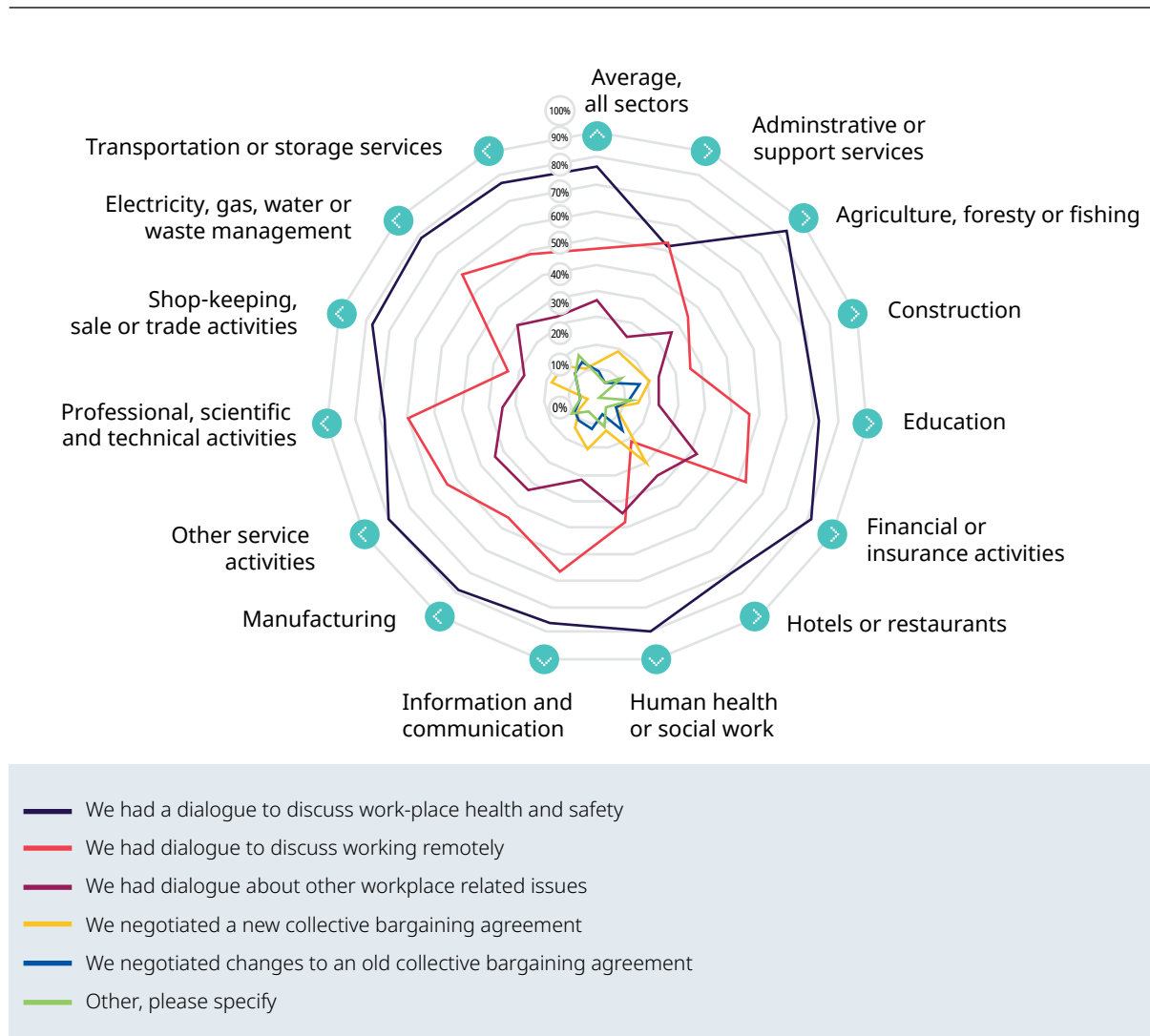


Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

While the overall trend in labour relations was positive, some sectors fared better than others. Human health and social work saw the highest share of enterprises report that labour relations improved, and 92 per cent of enterprises said that relations had either improved or not changed. Enterprises with a significant in-person component to their work, such as manufacturers or hotels and restaurants who were less able to

move all staff groups to remote work, were more likely to say that labour relations had worsened. This was most common in manufacturing, where just under a quarter of enterprises said relations had worsened. Even in this sector, however, the overall trend was still positive. Large enterprises were the most likely to report improved labour relations, but there was not a significant difference between enterprises of different sizes.

Figure 37. Share of enterprises that engaged in dialogue or negotiation with workers since the start of the pandemic, by subject of dialogue and sector



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

Dialogue about work-related issues has been common during the pandemic, and helped sustain and improve labour relations for many enterprises. The vast majority of enterprises – 86 per cent – have had workplace dialogue during the pandemic, and unsurprisingly the most common focus of that dialogue has been workplace health and safety. Some enterprises noted that they had

“workplace safety committee, made up of both management and worker representatives” which meet to discuss health and safety concerns.⁵⁰ Dialogue about remote work was also common. A notable share of enterprises also had discussions about collective bargaining agreements, with 14 per cent negotiating a new agreement and 10 per cent making changes to an old agreement.





“We have what is called staff forum, with representatives that we dialogue with from time to time. These representatives are in close contact with other members. So, what we do as the senior leadership team is have a situation where we reach out to these staff representatives to hear what is coming from the team”.

-Enterprise in Uganda



The overall improvement in workplace relations and increase in dialogue reported by enterprises comes in spite of the many adaptations and challenges faced at workplaces. For example, many enterprises in Southern Africa are having to make changes to employment contracts. Many existing contracts referred to ‘the office’ as the place of work, but are now being designed to allow for flexibility of location while also including clear organisational expectations for social interaction, attendance and worker obligations/entitlements. Others are changing contracts to clearly outline the circumstances when remote work is allowed, and how that work is monitored and managed. There have also been challenges related to increased worker complaints in countries such as Tanzania. This has led to an increase in cases at the country’s Commission

for Mediation and Arbitration (CMA), often due to employer retrenchment.

Managing a changing workplace and the growth of remote work has raised new challenges for workplace relations. Employers often want to remotely monitor work and productivity. However, trade unions have “considerable unease around pandemic-related surveillance, contract tracing and privacy” in many countries.⁵¹ The shift to remote and hybrid work has also raised many questions about if and how the terms and conditions of work will change. While enterprises stand to benefit from lower costs of remote work, they face a difficult challenge of if and how to do this without consultation or bargaining with the affected workers.⁵²



Photo Credit | Marcel Crozet-ILO Photo News

“The biggest challenge was around negotiations with the union...they struggled to get to terms with the virtual platform as they were used to the physical contact where they could even read the body language of the management team.”
- Enterprise in Eswatini

Dialogue has also been common at the national and sectoral levels across Africa, with trade unions and EBMOs taking on important roles, actively communicating the views of workers and enterprises on COVID-19 impacts and policy responses. For example, In Uganda, the national EBMO the Federation of Ugandan Employers (FUE) played an important role in national level dialogues, helping communicate the needs of enterprises and negotiate an “agreement between the workers, government and employers to help protect the employers and enterprises at large, this has helped to make some short-term

arrangement in that protecting the incomes and enterprises during the lockdown.” FUE and Uganda’s National Organization of Trade Unions also issued a joint statement pledging to re-invigorate efforts and commitment of employers and workers to prevent and control COVID and ensure a comprehensive response to the pandemic. Similarly in Kenya a national Tripartite Memorandum of Understanding was drafted to establish a pathway as the country navigated the pandemic and its impact on the workplace, with the Federation of Kenyan Employers (FKE) playing an important role.



An important element was visible examples of national actors pulling together for the good of the country. Take this example from Siphon Pityana, the former President of Business South Africa (BUSA) during the height of the pandemic. "We are urging our member organizations to ensure that the President's measures are implemented as speedily as possible, and to increase awareness and positive action wherever possible. The President also referred to the potentially damaging impact on our economy that the COVID-19 virus will have. This will exacerbate the economic crisis we are already experiencing, and business will work with government and labour to pull resources and capacity together to mitigate the economic, health and social risks posed by the virus."

Similarly, trade unions have played an important role, both in dialogue and in support of their members. Increased worker concern about health and safety is one contributor, with workers sometimes believing that employers are not doing enough to ensure workplace safety. In Kenya, for example, our research found that only 15 per cent of enterprises provided PPE at the workplace. Some trade unions noted that in some contexts, layoffs have disproportionately targeted unionised workers and labour activists.⁵³

Across Africa, unions and EBMOs have reached numerous bipartite and tripartite agreements about a range of topics. For example, in Tanzania, the Labour, Economic, Social and Economic Council (the national tripartite forum at for labour and employment matters) and other national committees met regularly during the pandemic to receive recommendations from workers, employers and private sector representatives. For them, the pandemic triggered a sense of partnership and the need for cooperation among stakeholders. In Ghana, the National Tripartite Committee and the Social Partnership Council starting using video conferencing tools enabling them to organize more consultative meetings in speedy and less costly ways which eventually gave birth to key policies at the national level. The topics of these bipartite and tripartite agreements have been many. For example, some have agreed to reduce working hours and pay lower wages in return for firms' committing not to reduce their workforce. This has helped to preserve employment and incomes while addressing the needs of enterprises who face reduced demand and often increased costs.⁵⁴

Because of their high-profile role in many countries during the pandemic, the views about EBMOs amongst the private sector have improved notably. More than 40 per cent of enterprises said that EBMOs had become more important during the pandemic, a sentiment that was especially strong in the manufacturing sector. On average only about one in eight enterprises thought that EBMOs had become less important during

the pandemic. Notably, the views of enterprises about trade unions were more neutral. On the whole, however, slightly more enterprises said that the importance of trade unions had decreased during the pandemic than said this had increased. In the retail and wholesale trade and professional services sectors, nearly four in ten enterprises said that trade unions had become less important.

"The situation is really difficult for businesses. Confédération Générale des Entreprises de Côte d'Ivoire (CGECI) are constantly in communication with the government of Côte d'Ivoire so that we can act collectively and in cohesion for the good of the country."
-Mrs Massogbè Toure, Vice-President of CGECI

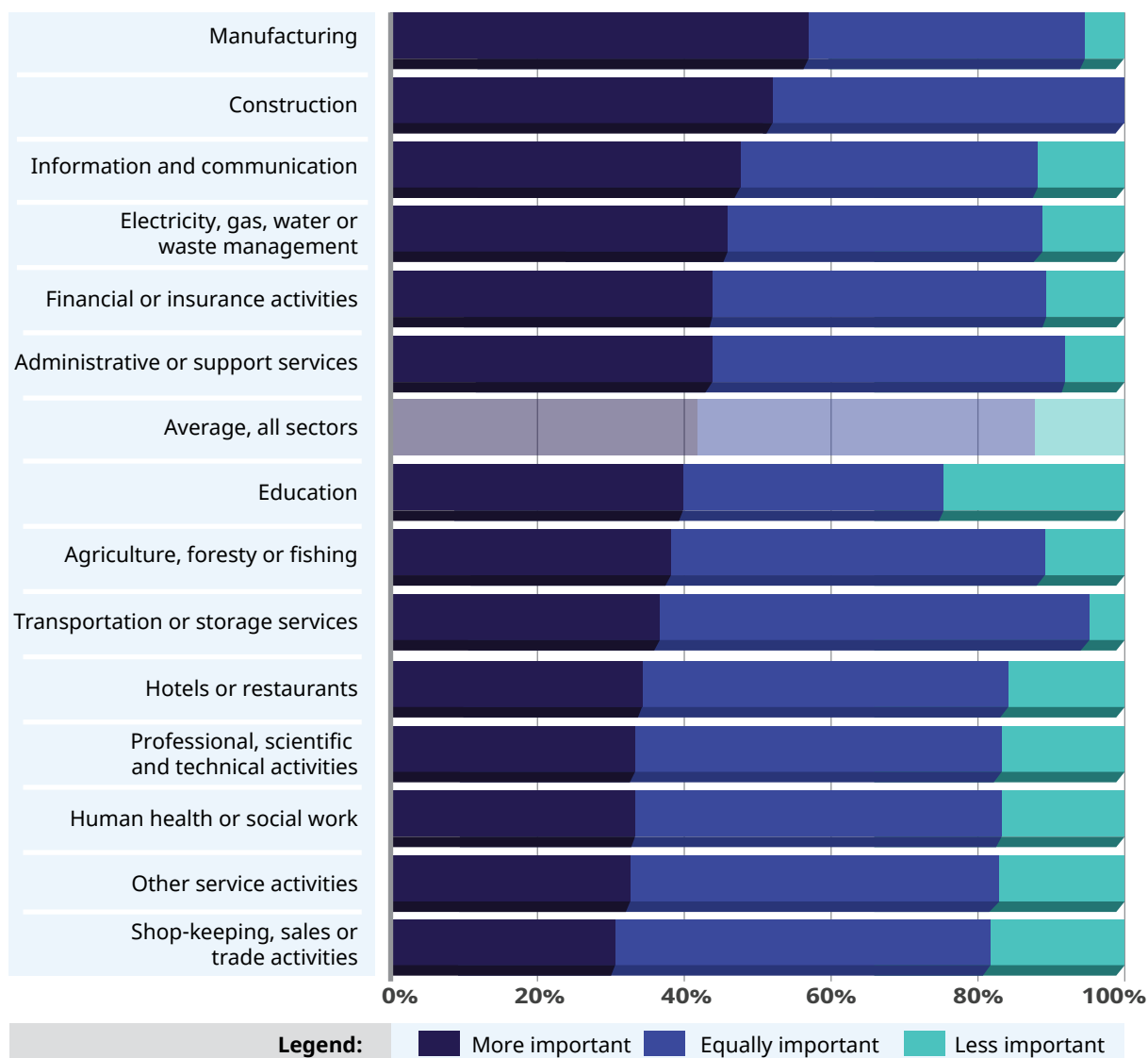
Manufacturers, on the other hand, were twice as likely to say that the importance of trade unions had increased than decreased during the pandemic. However, many enterprises may not have direct engagement with unions, given that unionization rates range from a low 2 per cent in the Seychelles to a high of 43 per cent in Egypt. This might limit the insights they have about the importance of unions, but also draws attention to the need for workplace cooperation in the many non-union workplaces across Africa.



Photo Credit | Pexels-august-de-richelieu-4427957



Figure 38. How has the pandemic changed the importance of employer and business membership organizations?



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021

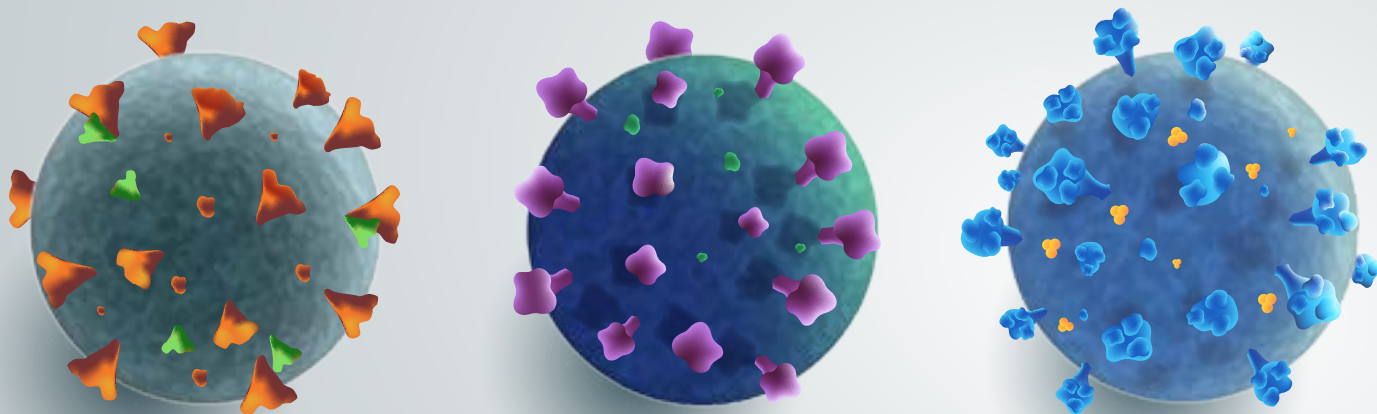
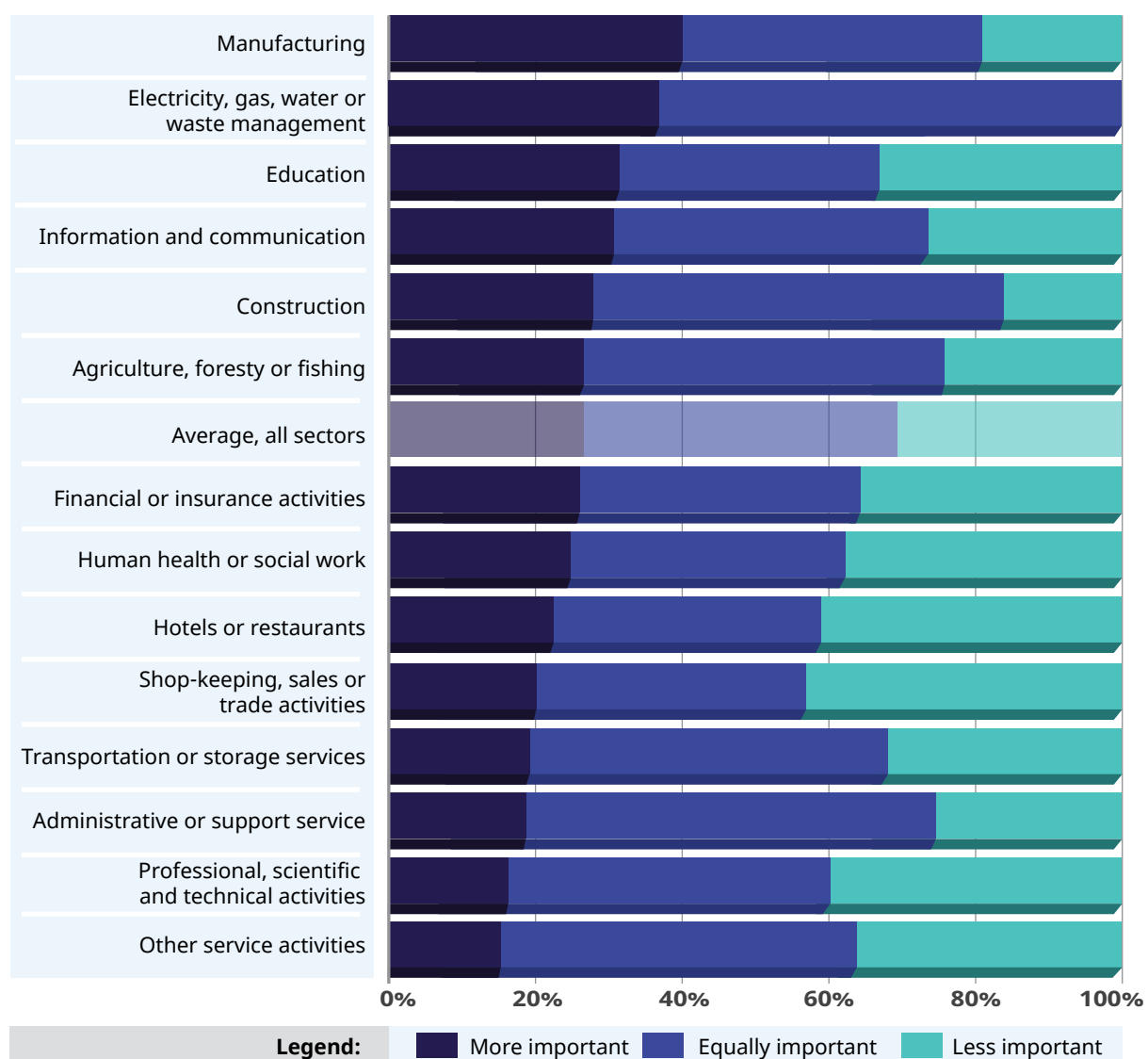
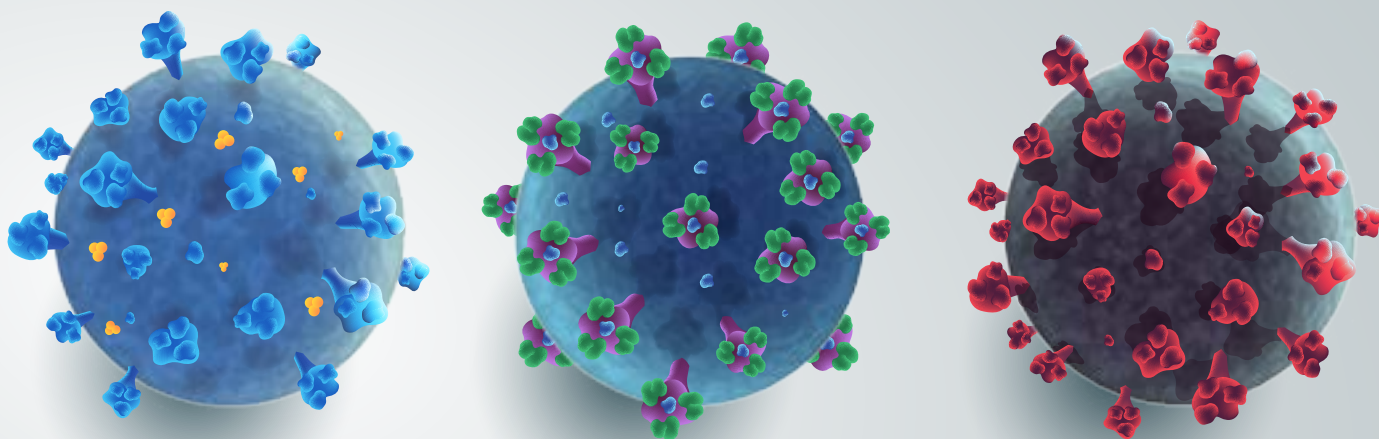


Figure 39. How has the pandemic changed the importance of trade unions?



Source: ILO ACTEMP Survey of Enterprises in Africa, 2021





TREND 10: Labour laws have struggled to keep pace with rapid workplace changes



The COVID-19 pandemic has changed many aspects of work, driving new trends and hastening ones that were already underway. Many of the changes have been adopted by necessity – with perhaps no better example than the mass shift to remote work. While there may be some shift back towards pre-pandemic ways of working after the pandemic subsides, many of these new trends are set to define work for the foreseeable future. However, the legal and regulatory frameworks in many countries have not come close to keeping up with the changing ways people work

Many employers in countries across Africa believe that labour law modernization is needed, to help reflect the fundamental changes to work that have come about during the pandemic. A number of business leaders noted that they thought labour market regulations were behind the curve.

Updates need to address a number of issues. Most evidently, they need to reflect the shift from in-person to remote work. They need to address questions around the employer's duty of care for remote workers, monitoring of remote work, and the worker's right to disconnect.

“The world of remote work needs a very different structure to the employer-worker relationship. It just isn't the same environment anymore. Regulators need to work with industry bodies to adapt faster.”
- Strategy Director, Pan African Multinational

Box 4.

The COVID-19 Pandemic and Changes to the Legal and Regulatory Framework in Africa



Across Africa, countries have taken a wide range of emergency steps to support enterprises and workers through the pandemic. However, fewer countries have made more permanent changes to the legal and regulatory framework to address the systemic impact of the pandemic on work. Nonetheless, some countries have started to take steps to align their legal frameworks with the changing nature of work. For example, in Togo, changes to the labour law have been promulgated in June 2021 covering telework. In Mozambique, a presidential decree proposed flexible work schemes, including telework, for enterprises and government workers. In Morocco, dialogue is taking place about a new legal framework for remote work.

EBMOs from across Africa have started advocating for changes in the labour laws that both help enterprises survive the COVID-19 pandemic and succeed in the post-pandemic economy. In Senegal, for example, the national EBMO, Conseil National du Patronat de Senegal, has advocated for a number of changes in labour laws. These include issues raised by the growth of remote work.

In Morocco, the national EBMO La Confédération Générale des Entreprises du Maroc (CGEM) has developed a draft bill regarding the legal framework governing remote work. It has shared that bill with key trade unions in the country as a starting point for dialogue and what the organization hopes is the eventual agreement on a legal framework. Amongst the 25 articles in the draft bill presented by CGEM is one addressing the right to disconnect for employees.



Source: Souad Badri, “Télétravail : la CGEM et les syndicats planchent sur un cadre juridique,” July 18, 2021, available at: <https://lematin.ma/journal/2021/teletravail-cgem-syndicats-planchent-cadre-juridique/361702.html>



Another important issue for labour laws to address is the health and safety concerns raised by the pandemic. In most countries, employers have a duty of care, sometimes outlined in Occupational Health and Safety legislation, to take reasonable measures to protect workers and people entering workplaces. Not to do so is a criminal offence in some countries, such as South Africa. In many countries enterprises are struggling with multiple aspects of this. One challenge is that both employers and workers have important responsibilities with regards to workplace health and safety. After all, it is people – both managers and workers – who can spread COVID-19, and therefore the efforts of everyone at the workplace are needed to ensure

the health and safety of others. Vaccinations are mandatory in some countries like Ghana and Malawi for parts of the workforce such as health or public sector workers. However, these mandates are rare for private enterprises, who note that they are struggling with whether and how they can responsibly compel workers to be vaccinated but at the same time not to breach the rights of workers. Some employers in South Africa and elsewhere are implementing systems which encourage workers to get vaccinated, rather than making it compulsory. However, many employers need greater clarity on how to balance these competing considerations.

Box 5.

The COVID-19 Pandemic and Changes to the Legal and Regulatory Framework in Nigeria



The Covid-19 pandemic has had a significant effect on enterprises in Nigeria, including in workplace operations. The introduction of remote work as well as changes to working hours and days as well as overtime have been had notable effects. Also, with the closure of enterprises as result of economic lockdowns, termination of employment, irregular payments and in some cases stoppage of wages and salaries have become common in workplaces. This has led to stakeholders viewing the prevailing law and regulatory framework as being deficient given the presence of Covid-19.

This view was echoed repeatedly by Nigerian enterprises interviewed for this report:

“One thing the pandemic has done is to expose the weakness and limitation in the legal and regulatory framework in terms of its inability to handle current realities.”

“There should be a revision of the law and regulatory framework to accommodate health

and safety issues such as mental health challenges posed by remote work.”

The “existing legal and regulatory framework has done a good job for the time it has existed, but it is time to review it to accommodate the new realities so as to make it fair to both employers and workers”.

The significant changes that the COVID-19 pandemic has created have led enterprises and EBMOs to push for changes to the legal and regulatory framework in numerous areas including:

- i. Recognition of flexible working hours occasioned by remote working;
- ii. Provision for health and safety hazards involved with remote work, especially psychological and emotional stress of workers; and
- iii. Adequate and clearly elaborated protection for employers against litigations related to the pandemic.

Countries will also need to take a deep dive into their legal and regulatory frameworks to identify country-specific issues that need updating. In Nigeria, for example, enterprises are obliged by relevant legislation to make contributions to the government-run Industry Training Fund for training needs. Upon training, the business is reimbursed at a certain percentage. Historically, enterprises have always conducted physical training, and the law did not envisage the virtual or online training which became the next normal due to the pandemic. The Nigeria Employers’ Consultative Association has suggested that the relevant ministries, departments and agencies consider this development and agree on the way forward that reflects current realities.

Though updates and changes to labour-related legislation are often slow, the pandemic has shown

how governments can move quickly on major policy decisions in some circumstances. Governments have reacted to the pandemic by, in some cases, making major policy decisions in days or weeks rather than months and years. This has called into question a common perception that changes cannot be achieved unless they go through a bureaucratic process that is often time-consuming and slow. Can the same appetite for radicalism that governments have shown in how they responded to the pandemic be extended to other important areas? The experiences throughout the pandemic suggest that this may be possible, though care must still be taken to ensure that changes continue to be evidence-based and developed through consultation with trade unions and EBMOs.



» THE WAY FORWARD

Africa is in the midst of unprecedented changes to the workplace that will affect enterprises and workers across the continent for decades. The ten trends highlighted here are some—but certainly not all—of the most important that will shape the future of working life in Africa. However, while some of the overarching trends are coming into focus, there are still many unanswered questions about their scope and full effects on societies across Africa. Some of these answers will only come into focus over years or decades. Yet these trends and changes are so significant, it is vital that stakeholders start or deepen dialogue now about how best to manage them to ensure they are inclusive and broadly beneficial. These changes will affect not just the nature of work, but access to opportunity and the distribution of benefits that flow from work.

There are a host of important questions that stakeholders will need to address across a range of topics. Some of these key questions include:

- How will labour laws govern remote work and other types of increased workplace flexibility?
- How will enterprises measure and reward worker performance in the future?
- How will the employer's duty of care change in the future, with the growth of remote work and the pandemic-related challenges to workplace health and safety?
- How will workplace changes brought about by the COVID pandemic, such as flexible or remote work, affect labour relations?
- How can skills training be delivered more broadly and efficiently, equipping a wide range of people with the diverse skills sets that enterprises need?
- How can women, minorities, persons with disabilities and other diverse groups fully benefit from changes to the nature of work in Africa?
- How will the globalization of labour markets affect the competitiveness of enterprises in Africa?
- How can changes to workplaces bring broad-based benefits instead of helping only a small share of workers, creating “digital elites”?
- How can national laws effectively govern remote work that crosses borders?

This report is a first attempt to outline some of the key workplace trends that are emerging or accelerating at formal enterprises in Africa due to the pandemic. Additional research and insights into this subject are essential. The approach of this study, where surveys were implemented with national EBMOs, limits our ability to draw strong, country-wide (or continent-wide) conclusions, and shows the need for future studies that can generate higher quality data that is representative of the entire private sector. This will provide better insights on the depth and breadth of these trends, as well as who is benefitting from them and who is not. There is also a need to dive deeper in key thematic areas. Two that are immediately obvious are the effects of workplace changes on African SMEs, and a detailed study on measuring productivity in remote and hybrid work environments. This research can help inform ongoing deliberations by national enterprises, social partners and policy makers about these complex and interrelated issues. We hope this report can help inform these key actors and serve to inspire the many important discussions and decisions that lie ahead.

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International Labour Organization
Route des Morillons 4
1211 Geneva 22
Switzerland