

LEADERS

For Sustainable Livelihoods

SKILLS GAP ANALYSIS FOR IMPROVED LIVELIHOOD SUSTAINABILITY IN LEBANON

REPORT | January 2017

COMPETENCY NEEDS AND SKILLS GAP ANALYSIS OF THE PRIVATE SECTOR IN MOUNT
LEBANON, TRIPOLI AND THE BEKAA



FUNDED BY THE EUROPEAN UNION
EU REGIONAL TRUST FUND 'MADAD'
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EDITOR'S NOTE:

The findings in the following report have been recently validated by Oxfam. The data triangulation exercise conducted by Oxfam extended over two phases. The first phase of the exercise, which was implemented in November 2016, consisted of running a triangulation survey, targeting 45 enterprises in Tripoli. During the second phase, Oxfam's team conducted a similar exercise in Mount Lebanon and Bekaa, targeting 44 enterprises. The two phases were successfully completed in December 2016.

The findings of the triangulation exercise reaffirm those identified by BRD in their skills gaps analysis and are included in the document. The challenges and limitations faced by the consultant are becoming the norm in the Lebanese context; hence, similar studies serve as policy informants, contributing to the efforts made to reduce the challenges, by seeking reliable genuine data to guide similar programmatic initiatives.

CONTENTS

ACRONYMS AND ABBREVIATIONS	6
LIST OF FIGURES	7
EXECUTIVE SUMMARY	8
1. BACKGROUND AND CONTEXT	13
2. METHODOLOGY	17
PROJECT PHASES	17
QUANTITATIVE DATA	18
QUALITATIVE DATA	18
LIMITATIONS	22
3. SMES POTENTIAL AND BARRIERS	22
GROWTH EXPECTATIONS AND BARRIERS	23
PERCEPTION OF THE IMPACT OF THE SYRIAN CRISIS	29
PROMISING SECTORS WITH SKILL GAPS	30
4. HIRING PRACTICES, PREFERENCES AND SKILL GAPS	35
HIRING PRACTICES: FULL TIME EMPLOYEES, PART TIME EMPLOYEES, AND INTERNS	35
WORKFORCE PREPAREDNESS	42
SKILL GAPS AND THE ROLE OF TVETS	43
HUMAN RESOURCES ISSUES	45
PROVISION OF TRAINING BY FIRMS	46
5. BUSINESS SUPPORT SERVICES	51
KNOWLEDGE OF BUSINESS DEVELOPMENT	51
BDS SUPPORT NEEDED	52

ADVERTISING AND MARKETING SUPPORT	53
6. IMPLICATIONS AND RECOMMENDATIONS FOR THE LEADERS CONSORTIUM MEMBERS	54
A COMPREHENSIVE APPROACH TO VOCATIONAL TRAINING REFORM	54
ANNEXES	67
ANNEX 1: LIST OF KEY INFORMANTS' INSTITUTIONS	67
ANNEX 2: KEY INFORMANT INTERVIEW GUIDES	67
ANNEX 3: FOCUS GROUP DISCUSSION GUIDE	71
ANNEX 4: SKILLS GAP ANALYSIS – SME SURVEY	76
ANNEX 5: STUDY'S TERMS OF REFERENCE	99
ANNEX 6: SAMPLING METHODOLOGY	101
ANNEX 7: LIST OF SMES	103
REFERENCES	113

ACRONYMS AND ABBREVIATIONS

BDS	Business Development Services
BRD	Beyond Reform & Development
CAS	Central Administration of Statistics
ILO	International Labour Organization
INGO	International Non-Governmental Organization
LCRP	Lebanese Crisis Response Plan
LF	Labour Force
LMA	Labour Market Assessment
MoSA	Ministry of Social Affairs
NEO	National Employment Office
SME	Small and Medium Enterprise
TMU	Technical Management Unit (of the Leaders Consortium)
TVET	Technical Vocational Education and Training
UNDP	United Nations Development Programme
UNHCR	United Nations High Commissioner for Refugees
WB	World Bank

LIST OF FIGURES

- 14 Figure 1: Poverty Rates (% of head count)
- 14 Figure 2: Real GDP Growth (%)
- 19 Figure 3: Sample SMEs by Sector Division
- 23 Figure 4: SME Growth (Revenue) Expectations
- 24 Figure 5: SME Growth (Revenue) Expectations per Sector
- 24 Figure 6: Size of Expected Revenue Growth
- 28 Figure 7: SME Expectations of Sector Growth
- 28 Figure 8: SME External Challenges
- 29 Figure 9: SME External Challenges, Food and Construction
- 29 Figure 10: Perceived Impact of Syrian Crisis on Business, Food and Construction
- 36 Figure 11: Share of SMEs Currently Hiring, and Number of Job Openings
- 38 Figure 12: Share of SMEs Employing Non-Lebanon Nationals, by Sector and Region
- 39 Figure 13: Perception of Top Sectors Willing to Employ Syrian Workers
- 41 Figure 14: Share of Female Employees in SMEs, by Region
- 42 Figure 15: Preparedness among Secondary School Jobseekers
- 42 Figure 16: Preparedness among TVET Jobseekers
- 43 Figure 17: Preparedness among University Jobseekers
- 45 Figure 18: Factors Affecting Hiring Decisions, By Sector
- 45 Figure 19: SME Management Challenges
- 46 Figure 20: SME Internal Challenges, by Sector
- 47 Figure 21: Difficulty in Filling Vacancies among SMEs
- 47 Figure 22: SME Training Provision, by Region
- 48 Figure 23: Reasons for Lack of Training Provision Reported by SMEs, by Region
- 48 Figure 24: Measures by SMEs to Meet Expansion
- 48 Figure 25: Skill Gap Areas, by Region
- 49 Figure 26: Skill Gap Areas, by Sector
- 49 Figure 27: Skill Gap Area, by Sector (traditional and food-/construction-related)
- 51 Figure 28: Knowledge of the Presence of Business Development Entities, by Sector and Region

EXECUTIVE SUMMARY

Leaders Consortium, composed of the Danish Refugee Council, Oxfam, ACTED, CARE and Save the Children are working together with the support of Madad Trust Fund on a programme that aims to contribute to the economic self-reliance, resilience and social stability of displacement-affected populations in Jordan and Lebanon, as prioritized by the Regional Refugee and Resilience Plan (3RP). The programme will work on enhancing the economic stability of all displaced and displacement-affected populations. The intervention targets 250,000 individuals in Jordan and Lebanon, as described in the terms of reference (ToR) of this project, including:

- Economically vulnerable individuals and households (with particular focus on women and youth);
- Existing and scalable private sector enterprises (MSMEs), and private sector associations;
- Marginalized Syrian refugees;
- Municipalities/Cadastres in the most displacement-affected areas, most often those that are hosting refugees.

The specific objectives of the programme include:

- Improved access to sustainable livelihood opportunities that benefit vulnerable households and individuals, particularly youth and women;
- Improving the economic environment to enable opportunities and service delivery in communities hosting refugees.

In Lebanon, the intervention is also supported by Danida/Ministry of Foreign Affairs of Denmark, in the framework of the Regional Development and Protection Programme – RDPP. Leaders Consortium commissioned Beyond Reform and Development (BRD) in Lebanon to conduct a skills gap analysis in Mount Lebanon (Jdaidet El-Matn, Baouchriyeh, Dekouaneh, Bourj Hammoud), Tripoli (both the city and district) and the Bekaa (Zahle and Baalbeck). The research serves as a baseline for the future programmatic interventions on economic resilience through job creation and job matching opportunities, as well as vocational training curriculum development efforts by partners of the Leaders Consortium.

THE LONG-TERM OBJECTIVES OF THE PROJECT ARE AS FOLLOWS:

- To facilitate the access of vulnerable groups, especially women and youth, to sustainable livelihoods opportunities;
- To help improve the economic environment within communities that host refugees, which are constrained by a scarcity of resources and employment opportunities.

THE SHORT-TERM OBJECTIVES OF THE SKILLS GAP ANALYSIS ARE TO:

- Identify current competency needs and skills gaps within the private sector;
- Provide an overview of the skills and employability patterns desired and preferred by sampled SMEs;
- Develop a set of recommendations on vocational training curricula and better linkages to the private sector, such as job matching and apprenticeships, to aid in the future programmatic decisions of the Consortium partners.

THE ABOVE OBJECTIVES WERE ACHIEVED THROUGH:

- A mapping of the enterprises, and their characteristics, present in the target areas;
- A mapping of actors that provide vocational training;
- An analytical report detailing the:

- o Business support services required to nurture growth at enterprise level;
- o The necessary skills training required to strengthen the human capital available to such enterprises;
- o Barriers (regarding skills, the legal framework, cultural practices etc.) that hinder the private sector in engaging with jobseekers;
- o Preliminary indicative training curricula development to inform the vocational training component of the wider intervention.

The desk review includes a review of existing literature on sectoral characteristics and ex-

pected growth on a regional and national level, the socio-economic implications of the Syrian refugee crisis, the skills gaps in specific sub-sectors, as well as an overview of the available technical and vocational education programmes.

This study takes into consideration the latest activities discussed in regional livelihood working groups, with an extensive focus on the Lebanese Crisis Response Plan (LCRP) Working Group's Lessons Learned Workshop report. The study also examines recent studies such as the UNDP Labour Market Needs Assessment that focused on the construction, industry and ICT (Information and Communications Technology) sectors, the Market Overview of SMEs in Beirut

and Mount Lebanon by IRC, among others. The

study also builds on additional research entitled Market Mapping for Employment and Job Placement (LMA) assessment conducted in the Bekaa and North regions of Lebanon by BRD, in partnership with Mercy Corps Lebanon. This report integrates a more in-depth investigation into the skills needed by local SMEs based on promising sectors and present hiring trends. The study was guided by the Technical Management Unit (TMU) of the Leaders Consortium and their feedback was integrated at the different stages of the research in order to optimize the methodology and tools used, which helped to improve the focus of the study.

The research consists of a quantitative survey (Annex 4) targeting employers and providing a guiding framework for the development of the main qualitative research tools. Qualitative research (Annexes 2 and 3) is addressed to employers (within formal and informal SMEs), employees and jobseekers, in addition to the main socio-economic actors, including INGOs, public and para-public institutions, syndicates and vocational training institutes. A total of 15 focus group discussions, 19 key informant interviews and 71 surveys were conducted for the study in Mount Lebanon, adding to the data collected

through the 196 surveys in the North and Bekaa that were completed during the study conducted with Mercy Corps.

The study uses qualitative data collection including focus group discussions (FGDs) and key informant interviews (KIs) to validate the quantitative results and has an in-depth focus on the following areas in the three regions:

- Skills gap training required for the human capital strengthening of SMEs;
- Barriers (related to skills, legal framework, cultural practices etc.) hindering SMEs' engagement with jobseekers;
- Experience and education desired by SMEs that have absorptive capacity regarding employment;
- Employability patterns preferred (exhibited?) by SMEs (including contract duration and typology, provision of benefits, employment policies, gender balance, salary scales, linkages with employment offices, NGOs, local authorities for job referral system);
- Trends related to the employment of vulnerable groups such as women, youth, and refugees;
- Trends related to formal and informal sector enterprises that employ Lebanese and non-Lebanese workers.

The report begins with a brief background and context discussion. The Methodology (Section 2) provides a brief on the project phases, the different quantitative and qualitative research methods used, as well a description of the sampling methods, in addition to highlighting research limitations. The report then presents a detailed analysis of potentials and barriers within the SME sector. Promising sectors that emerged from KIs and FGDs are given special focus and analysed in text boxes with corresponding implications and recommendations for the members of the Leaders Consortium. Hiring preferences, competency needs and skills gaps are analysed in Section 4. Section 5 on Business Support Services sheds light on the knowledge and usage of business development services by SMEs. Finally, Section 6 distils the implications

and recommendations for the members of the Leaders Consortium that emerged from the research, including implications related to skills gaps (soft and technical skills), SME development, the inclusion of Syrian refugees, women, and youth, and the policy environment. A summary of findings is given below.

SMES: POTENTIAL AND BARRIERS

Despite uncertain conditions, surveyed SMEs showed optimism with regards to expected growth of their own revenues. These SMEs were mostly in the services sector, which includes healthcare services, education services, hotels, restaurants, software and computer services, technology technician services and other sub-sectors. Those SMEs within these subsectors tended to perceive an improvement in the political situation and their own successful work strategies as reasons behind possible revenue growth in the coming years. SMEs that were pessimistic about growth were primarily concerned with the security situation, market competition and low purchasing power.

According to economic development experts and local stakeholders from municipalities and traders' unions, the following sectors were identified as currently experiencing limited labour absorption capacity: the car repair sector, furniture production, the textile industry, and the tourism sector; this was applicable in some regions more than others (further detail can be found in Section 3).

There is a marked difference in the perceived impact of the Syrian crisis on business in the three regions that the survey covered. In the Bekaa, the majority of SMEs surveyed reported that they expected a positive impact. On the other hand, half of Mount Lebanon SMEs reported a negative impact, while there was an even distribution of SMEs in Tripoli that perceived a positive, a negative and a neutral impact regarding the Syrian crisis and business.

Promising sectors identified in FGDs with Leba-

nese and Syrian employees and jobseekers and mentioned by key informants including municipalities, traders unions, Chambers of Commerce and INGOs active in the regions included: cultural/heritage-related tourism (including arts and crafts), nursing, jewelry production and food-related sectors. Support for technical and management skills within those sectors, as well as additional investment and support in acquiring machinery, is important in order to optimize their labour absorption capacity.

HIRING PRACTICES, PREFERENCES AND SKILLS GAPS

Based on quantitative findings, the percentage of SMEs that hired full-time workers over the past three years does not exceed 70% in any of the three regions covered by the study. Focus group discussions highlighted that part-time employment is more common for some job types, such as waiters and sous-chefs in food-related sectors.

The vast majority of SMEs across different sectors (services, wholesale/retail, manufacturing, construction and agriculture) reported that they employ non-national workers, including Syrians and Palestinians. Furthermore, the survey showed a low proportion of female employees among SMEs across all three regions.

A significant number of the SMEs in the survey (28%) reported that they are currently hiring, this is consistent across all three regions.

However, common issues included:

- The educational background of most employees has no relevance to the field in which they work;
- The government-approved VT (vocational training) curriculum is outdated and not linked to the skills needed on the job market.

SOME RECOMMENDATIONS ARE AS FOLLOWS:

There is an opportunity to promote hiring in the 19–22 age group – including as interns, in order to enable young people to gain work experience – since there appears to be willingness on the part of both the employers and jobseekers in this regard. It is also important to improve the pool of teachers for all the ‘clusters’ of vocational training through the provision of support for vocational trainers. Other solutions include organizing regular Technical Vocational Education and Training (TVET) peer learning opportunities to improve knowledge sharing and replication of good practices, working with TVET institutes to update curricula to include a practical section, and updating curricula to fit market needs today, including updates in the field of technology, including, but not limited to, smart applications that can benefit workplaces, etc. This is important, alongside advocacy for the certification of updated curricula at the level of the Ministry of Education and Labour, as well as other suggested recommendations within the report.

BUSINESS SUPPORT SERVICES

Despite the existing skills gap, there is an overall lack of knowledge of, and relating to, business development entities. SMEs in different sectors suggested those bodies that they believed could support them. In Mount Lebanon, businesses seemed more resistant to Business Development Services (BDS), indicating that they did not need training. In the Bekaa and Tripoli, firms enjoyed some successes – examples of which are detailed in the body of this report – some of which were partially due to INGO intervention, and as such, these firms were more open to the idea of receiving support from BDS.

IMPLICATIONS AND RECOMMENDATIONS FOR THE LEADERS CONSORTIUM MEMBERS

In certain promising sectors (cultural tourism, crafts, nursing, jewellery production and sales, food, construction, and agriculture), the skills needed were related to technical skills such as boat tour operators and skills for city tour guides for the cultural and heritage subsectors.

In jewellery and crafts-related subsectors, the skills needed were at the level of operating new machinery that would render the companies more competitive in the market and as a result more able to produce and absorb labour. In the food sector, skills needed included food safety and hygiene, alternative agricultural methods, and product marketing.

As for management-related skills, there was a need for various skills such as human resource management, accounting and budget management, marketing – including packaging, sales, customer relations and operations specifically related to specialized equipment and machinery.

Suggestions for filling skill gaps included, but were not limited to: co-designing curricula with local organizations, TVET institutes and employers; providing internship placements to provide opportunities that would support the trainees' in applying what they learnt on the job; and building their experience and offsetting training costs through partnerships with vocational and technical institutes and employers.

Soft skill gaps were also tackled, especially the promotion of better communication skills, and supporting workplace ethics among workers and jobseekers that would increase their levels of commitment, diligence, teamwork skills and client relations, all of which areas were highlighted as skill gaps. Suggestions to fill those skill gaps included, but were not limited to, collaborations with NGOs and municipalities to es-

tablish a work-life centre, as well as the provision of training in specified areas.

SME development should be supported through matching events with BDS services, offsetting the cost of the latter, promoting the culture of business support services and their benefits to the companies, and other suggestions that will follow in this report.

The report also presents recommendations that target the inclusion of Syrian refugees, both men and women, by suggesting reforms at the policy level, the adaptation of training programmes to adapt their skills to local labour market needs, in addition to soft skills development.

Policy-level recommendations include advocating for the alleviation of barriers to SME growth, and advocating for the regulatory expansion of the sectors in which Syrians can legally work.

1 BACKGROUND AND CONTEXT

This section on context and background highlights the current economic dynamics and labour market trends; it analyses the sociopolitical challenges that constrain the Lebanese economy and how they contribute to shaping its structural characteristics.

Once the general sociopolitical and economic national framework is established, the analysis then focuses on the existing labour market mismatch and existing skills gaps. As part of the literature review, the study looks into different studies and reports issued by local and international organizations to allow for better complementarity between different initiatives, to avoid duplication of efforts, and to capitalize on existing market data.

SOCIOPOLITICAL DYNAMICS CONSTRAINING ECONOMIC DEVELOPMENT

Lebanon is significantly affected by the regional instability, most notably from the crisis in neighbouring Syria, as a result of which, the country's economic outlook continues to be uncertain. The influx of refugees constitutes a substantial demographic shift within Lebanon. In 2014 the United Nations High Commissioner for Refugees (UNHCR) estimated that the total Syrian population in Lebanon amounted to 1,029,322 individuals, corresponding to a 27% increase in the country's population in only three years, as indicated in the map in Annex 8. The crisis has also led to an increase in sectarian strife in the areas close to the Syrian border, raising concerns about the general security situation, which is detrimental to investment. The advice against travel to Lebanon issued by the Gulf Cooperation Council, for example, has affected several sectors of the economy, especially real estate-related activities such as construction and tourism.

The current political instability only raises

further uncertainty for investors. Since May 2014, political parties have failed to elect a president for two consecutive years (until November 2016).

This void paralyzes the decision-making process and the possibility of a significant labour market reform. One important and indicative example of political paralysis and corruption is that the Parliament has not ratified national budgets for over a decade. Most recently, and at the time of the writing of this report, the garbage crisis, which was only superficially postponed, has again become an issue, and public outrage is resurfacing. Expectations point to a sustained weakness in public finances, which affects the prospects for growth. The current legal framework is outdated and limits the potential for economic growth: according to a 2012 World Bank census, 95% of Lebanese firms said they would hire more if it weren't for the constraints placed upon them by the current legal steps in hiring procedures. Moreover, weak governmental institutions and corruption lead to structural inefficiencies. The last official labour market needs analysis was conducted in 2004, limiting access to reliable data. Infrastructure issues, such as power cuts and the poor state of roads, also limit competitiveness and investment.

The Syrian crisis and poor governance both contribute to the aggravation of poverty in Lebanon (Figure 1). Between 2011 and 2014, poverty rates are estimated to have increased by 61%. Child labour has also re-emerged, and the majority of children who do not attend school are Syrian refugees. This increases the need for public services, which cannot be met given the current inefficiencies and general malaise among public sector institutions and government branches. Given their proximity to the border with Syria, both the Bekaa and the North regions are highly impacted by the Syrian crisis and also continue to be overlooked by the government.

Both regions host the largest estimated numbers of Syrian refugees. In Bekaa, they constitute

48% of the population, according to a UNHCR census undertaken in June 2015. This has led to the further impoverishment of these regions and has affected vulnerable Lebanese communities. For example, in the Tripoli area, poverty rates have increased by up to 69% in Jabal Mohsen and 87% in Bab el Tebbanneh.

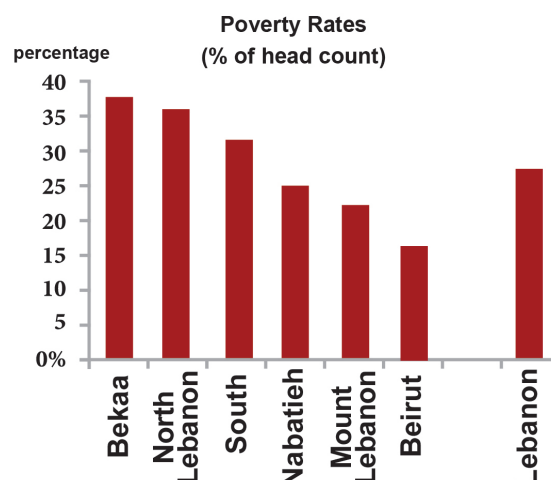
Although the Lebanese economy has demonstrated impressive resilience in the face of the Syrian crisis, these various social and political trends have negatively impacted economic growth, limiting opportunities in the labour market.

OVERVIEW OF THE GENERAL ECONOMIC STRUCTURE AND TRENDS

Since 2009 the Lebanese economy has witnessed a reduction in growth (Figure 2). Current estimates expect a medium-term real GDP growth of around 2–2.5%, this is only slightly higher than the past three years. Moreover, this low growth has not translated into job creation and the economy remains locked in a cycle of low productivity and low wage equilibrium. In 2010 the International Labour Organization (ILO) estimated 23,000 new jobs would be needed each year over the following decade to cover the increase in labour supply, which is six times higher than the actual number of jobs that were then being created. The number of new entrants to the labour market exceeded these estimates, reaching 32,000 in 2013 for only 5,000 new job opportunities. In addition, the newly created jobs are concentrated in low-skill and low productivity sectors, which tend to be occupied by migrant labour, including refugees.

The Lebanese economy is dominated by services, which accounted for 73.4% of GNP growth in 2012, followed by the industry and agriculture sectors, which respectively contributed up to 20.5% and 6.1% of GNP. The labour force has been shifting away from agriculture and manufacturing towards trade, services and construction. Between 2004 and 2009, 47.3% of all new jobs were created in the trade sector, 34.7% in the services sector and nearly 10% in construction. Agriculture, construction and

FIGURE 1: POVERTY RATES (% OF HEAD COUNT)

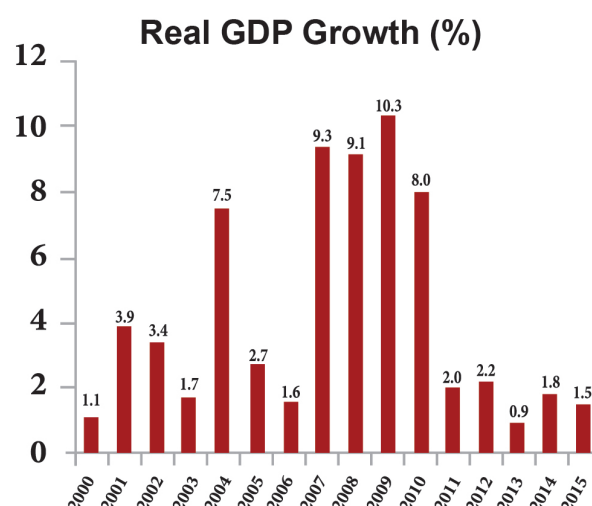


services are frequently identified as sectors with potential for growth and job creation. The information and communication technology (ICT) and energy sectors are also emerging.

The entrepreneurial scene is well developed in Lebanon and self-employment is very popular: 30.7% of all employed individuals were own-account workers in 2009. MSMEs form the pillar of the economy, amounting to more than 90% of Lebanon's companies and employing 50% of the population. Micro-enterprise start-ups generate the majority of employment opportunities.

An increase in productivity translates into a higher level of employment for these firms than for their larger counterparts: a 1% increase in productivity raises job creation by 3.9%.

FIGURE 2: REAL GDP GROWTH (%)



Consequently, the government is paying greater attention to this sector and has designed several measures to support entrepreneurship such as the Integrated SME Support Programme (ISSP) in 2004, implemented by the Ministry of Economy and Trade and the Ministry of Industry in Lebanon.

Support services still need to be further developed, especially in order to improve access to financing mechanisms for MSMEs. Many NGOs seeking to create employment opportunities for vulnerable populations have also taken a special interest in this sector. However, such support does not equally benefit all regions, as most MSMEs are concentrated in Mount Lebanon (55%) and in Beirut (23%). Registered MSMEs also face competition from the informal sector. According to a World Bank survey, 57.1% of responding firms were competing against unregistered companies and 36.9% considered practices of these illegal competitors as a major constraint for their business development.

The current strength of the informal market is a major feature of the Lebanese economy and its development can be partially attributed to the inadequacies of the existing legal framework regarding labour and employment. It is estimated that it accounted for 37% of the total GDP in 2012. In some areas, the informal sector dominates the market, for example, in Tripoli, where the formal sector only represents 30% of the city's market, at the most. The highest levels of informal employment are found in the agriculture sector (92.4% in 2009, according to Administration of Statistics (CAS) estimates) followed by construction and transport (80.7% and 71.7%, respectively) and finally trade (58.1%). Informality tends to be higher among men and youth and is characterized by poor working conditions and frequent abuse.

FOCUS ON LABOUR MARKET MISMATCH

In 2014 the Lebanese labour force amounted to 2,037,240 individuals (World Bank 2014). The activity rate, although it has slightly improved,

remains relatively low (48% in 2009). This figure hides the substantial disparities between men and women, the latter being much less economically active (23% compared to 73% of men in 2009). Among the economically active, many face the issue of unemployment.

Data is controversial: according to CAS, the unemployment rate stood at 6% in 2009; by 2012, the World Bank had set the national rate at 11%, whereas the Ministry of Labour and the National Employment Office gave estimates ranging from 20 to 25%. Women have greater difficulty finding a job than men, although they have better educational attainment, with respective unemployment rates of 18% and 9% in 2010. Unemployment is particularly severe among youth at an estimated 34%, which further discourages them from working.

Access to employment is also an issue for Syrian refugees, as even before the crisis, the Lebanese labour market was already facing limited absorptive capacity. According to World Bank estimates, Syrian refugees formed between 27 and 35% of the country's labour force in 2014. On average, Syrian refugees have lower educational attainment levels than their Lebanese counterparts. Refugees tend to concentrate in low-skill activities such as domestic and personal services (27%), agriculture (24%), commerce (15%) and construction (12%). This influx has increased competition over these types of jobs and has particularly affected the most vulnerable populations (women, youth and low-skilled workers).

Due to the impact of Syrian workers on the labour market, the Lebanese government has recently revised its policies toward refugees, limiting their work opportunities. Decrees from the Ministry of Labour currently restrain their activity to the construction, agriculture and environment sectors. In 2014, a set of regulations were adopted with the explicit aim of decreasing the number of refugees.

These include a set of new entry requirements, including the obligation to sign a pledge not to

work imposed on all refugees registered with the UNHCR. In addition, the restrictions of work permits and the introduction of the sponsorship system present additional constraints. These measures have led to a further decrease in the living conditions of Syrian refugees, 69% of which are currently estimated to be living on less than the minimum expenditure basket (less than \$114/capita/month), including 52% under the survival minimum expenditure basket (less than \$87/capita/month).

There is indeed an important mismatch between the skills desired by employers and the current skills of jobseekers. It is estimated that sectors such as tourism and industry are currently in need of up to 30,000 and 15,000 employees, respectively, but cannot hire due to the discrepancy between the profiles of jobseekers and the required skills. Employers rely on migrant workers to fill these positions. There is a particular shortage of soft skills (such as communication and writing skills) and technical and vocational skills, as well as management skills. Many owners of MSMEs also appear to lack appropriate skills for enterprise growth, such as business planning, financial management, marketing and customer service.

Many of these gaps can be attributed to general inadequacies in university curricula.

The correlation between educational level and unemployment illustrates the fact that higher education establishments are failing to address the market's needs. In 2012, 8.8% of Lebanese who had a university degree were actively seeking a job, compared to 7.7% of those holding a postgraduate degree and 4.4% of illiterates. As a consequence the expectations of educated Lebanese exceed the realities of the domestic market, leading to very high levels of emigration.

The TVET system does not produce sufficient numbers of graduates with adequate technical skills. The quality of existing programmes is limited, and they are insufficiently coordinated.

The government has taken a few measures in this direction such as the New Entrants to Work (NEW) programme, which will 'offer young Lebanese first-time jobseekers the opportunity to enrol in an integrated programme of life skills training, counselling, and placement services combined with two years on-the-job training (OJT) in a private firm'. Its attention to TVET education, however, remains insufficient, as it has decreased the annual budget of the National Employment Office (NEO) allocated to vocational training programmes, and existing public sector efforts remain disconnected from the needs of the private sector. The number of apprenticeships needs to be increased and partnerships between TVET institutions and firms need to be developed. Other actors, such as NGOs, offer market-based skills training, but several of these also seem to be based on beneficiaries' demands, rather than employers' needs. Moreover, the absence of coordination mechanisms and collaboration between the actors involved in TVET leads to inefficiencies and duplication of effort.

Given the fact that provision of skills through vocational training has become common among various organizations, and many of them have identified skill needs through dispersed and rather compact labour market studies, this skill gap analysis was intended to augment the existing literature by considering not only potential sectors and the corresponding skill gaps, but also the different means and practices that enable or hinder eventual employability and job creation. This is achieved through the collection of comprehensive data, both quantitative and qualitative, from diverse sources, including employers, employees, jobseekers, as well as important stakeholders, such as organizations that have their own field experience in relation to the labour market and vocational training, and representatives of government institutions who are experts on the policy and regulatory perspectives. The enquiry also looked into macroeconomic market demand and SME potential, as well as micro socio-economic needs and practices.

Within the above context, the Leaders Consortium is working on different programmes that aim to improve the economic conditions of vulnerable communities (host and refugee communities) in Tripoli, the Bekaa, and Mount Lebanon regions, by increasing their income and thereby their ability to secure their basic needs through employment opportunities and skills matching.

The Leaders Consortium's long-term objectives within the framework of this study are two-fold: (i) To facilitate the access of vulnerable groups, especially women and youth, to sustainable livelihoods opportunities; and (ii) To help improve the economic environment within communities hosting refugees burdened by a scarcity of resources and employment opportunities. The short-term objectives of the study are: (i) To

identify current competency needs and skills gaps within the private sector; (ii) To provide an overview of the skills and employability patterns preferred by sampled SMEs; (iii) To develop a set of recommendations on vocational training curricula and better linkages to the private sector such as job matching and apprenticeships for the future programmatic decisions of programme partners.

This report provides a competency needs and skills gap analysis of Mount Lebanon (Jdaidet el-Matn, Baouchriyeh, Dekouaneh, Bourj Hammoud), Tripoli (city and district) and the Bekaa (Zahle and Baalbeck) to inform future programmatic interventions of Leaders Consortium partners regarding economic development through job creation and job matching opportunities and vocational training curricula development efforts.

2 METHODOLOGY

The skills gap analysis research is based on qualitative as well as quantitative data collected in three regions of Lebanon: Tripoli, Bekaa and Mount Lebanon. The main purpose of the study is to uncover promising sectors with relatively high labour absorption capacity, and identify within those sectors the gaps in business, vocational and soft skills, as well as gaps in business development services. This will eventually guide the initiatives undertaken by

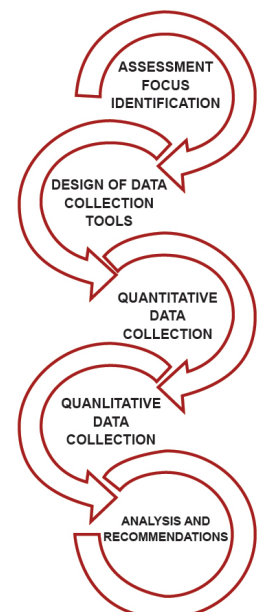
international organizations aiming at increasing job matching and job creation, and those hoping to enhance the ecosystem of SMEs through the improvement and specialization of the skill set of the existing labour force. The research focuses on the demand side of labour while taking into consideration SME needs, but also analyses skill gaps from the perspective of employees, jobseekers, and vulnerable groups, including women, youth and Syrian communities.

PROJECT PHASES

The project developed along five phases. A brief on each of the phases is provided below:

ASSESSMENT AND FOCUS IDENTIFICATION

In order to identify the gaps in existing and available data, and to specify the focus and design of the rest of the research, this phase included the review of existing literature, the list of documents provided by the TMU, such as the LCRP Working Group Lessons Learned Workshop report, as well as recent studies such as the UNDP Labour Market Needs Assessment that focused on the construction, industry and ICT sectors, the Market Overview of SMEs in Beirut and Mount Lebanon by IRC and others, in addition to the Market



Mapping for Employment and Job Placement report,

DESIGN OF DATA COLLECTION TOOLS

This phase consisted of the adaptation the SME survey, five focus group discussion guides and two semi-structured interview guides.

QUANTITATIVE DATA COLLECTION

The SME survey was addressed to owners and/or managers of 71 SMEs in Mount Lebanon. A quantitative data set from a previous study of 196 SMEs in North Lebanon and Bekaa was also drawn upon.

QUALITATIVE DATA COLLECTION

This consisted of conducting focus group discussions (FGDs) and key informant interviews (KIIs). A total of 15 FGDs were conducted in the three regions, focusing on employers within the formal and informal sectors, Lebanese women and youth employees, jobseekers, and Syrian workers and jobseekers. A total of 19 KIIs were conducted with key informants from vocational training institutes, associations, ministries, international organizations and local authorities.

ANALYSIS AND RECOMMENDATIONS

This phase consisted of a cross-analysis of quantitative and qualitative data to explore sectoral potential and labour absorption capacity, barriers and challenges, hiring practices and employability patterns, and the skills gaps highlighted by SMEs. The report analyses promising sectors with relatively high labour absorption capacity and with skill gaps that emerged from the qualitative analysis.

Those skill gaps are investigated from the point of view of employees, jobseekers and vulnerable groups including women, youth and Syrian communities, and provide recommendations for interventions with both the Lebanese community

and Syrian refugees.

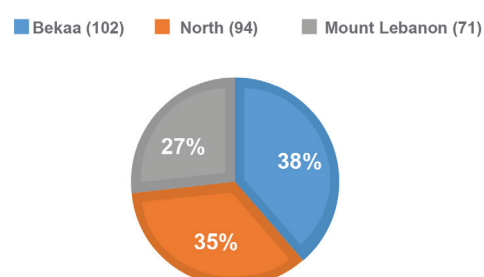
This report also provides an analysis of the types of skill gaps and, wherever data allows, it includes more detailed skill needs that were raised by SMEs, as well as highlighting current knowledge about, and usage of, business development services. The report distils the implications and recommendations that emerged from the research in order to inform the initiatives undertaken by international organizations that aim to increase job matching and job creation, and those hoping to enhance the ecosystem of SMEs through the improvement and specialization of the skill set of the existing labour force.

QUANTITATIVE DATA

The survey included a total of 267 surveys completed by SMEs, which consisted of 71 surveys in Mount Lebanon, and 196 surveys from the previously conducted study. Additional surveys were conducted in Mount Lebanon to complement the existing data and to attain a similar dataset for all the regions in the study, to allow for comparability. The majority of firms surveyed (64%) have been in operation for over 11 years.

DEFINING SMES

FIRMS BY REGION (%)



For the purpose of this study, SMEs were categorized primarily by the number of employees, as follows:

- Micro firms have less than ten employees
- Small firms have between ten and 50 employees
- Medium enterprises have 50 to 200 employees.

It should be noted that the SME Strategy of Lebanon (MoET 2014) recommends a definition that combines the number of employees within the company and its turnover. This survey, conducted by BRD, expands the medium enterprise category to include up to 200 employees, and reports on turnover separately.

Table 1 below shows the distribution of firms in the survey in the general/traditional sectors according to their annual sales turnover (USD).

TABLE 1: ANNUAL SALES TURNOVER IN USD BY (GENERAL/TRADITIONAL SECTORS SURVEYED)

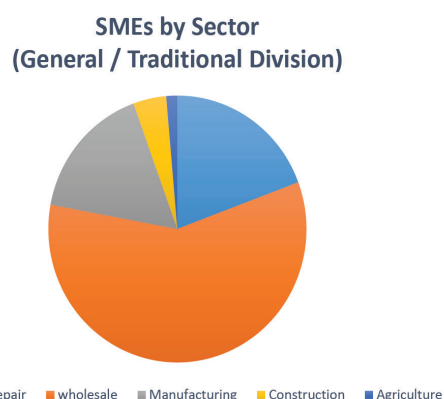
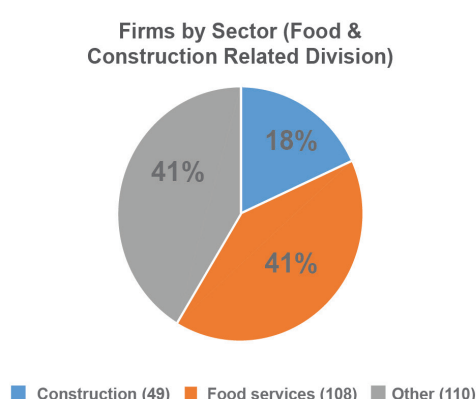
	Annual Sales Turnover (USD)		
	Below 250k	250k–1 million	Over 1 million
Services & Repair	37%	25%	38%
Wholesale & Retail	29%	26%	45%
Manufacturing	27%	27%	46%
Construction	25%	28%	47%
Agriculture	38%	5%	57%

SECTOR DIVISION

The analysis of SME data was conducted by region and/or by sector, depending on the analytical question under consideration. SMEs were categorized according to the following divisions:

- The General/Traditional sector
- The Food and Construction-Related sector
- The analysis also included SMEs in 'promising sectors' based on the qualitative data collection.

FIGURE 3: SAMPLE SMEs BY SECTOR DIVISION



THE GENERAL (OR TRADITIONAL) SECTOR is the result of categorizing SMEs based on broad sectors including services and repair, manufacturing, agriculture, wholesale and retail, and construction. This division allows for the validation of the potential sectors that were mentioned in the qualitative analysis section, and for broad guidance into qualitative questions. Figure 3 shows the distribution of the total number of SMEs over the general sector division.

THE FOOD AND CONSTRUCTION-RELATED SECTOR is based on the two main sectors that were identified by the Leaders Consortium as

sectors of interest. Analysing SME data based on this division allowed for a more specific examination of all the subsectors that are related to food and those related to construction.

For food-related sectors, this categorization includes food services, food manufacturing, food-related agriculture, and food wholesale and retail. For the construction-related division, the categorization includes services related to construction, including plumbing, electricity repair, manufacturing of construction materials, and wholesale and retail of products related to construction.

SMES CATEGORIZED AS 'FOOD-RELATED' SECTORS INCLUDED THE FOLLOWING SUBSECTORS:

- Agriculture: Food crops, oil and oil seeds, livestock, viticulture, dairy, fishing
- Manufacturing/Industry: Agro-industry, packaging only if related to food
- Wholesale: food and beverage retail
- Services and repair: Restaurants, travel and tourism only if related to food

SMES CATEGORIZED AS 'CONSTRUCTION-RELATED' SECTORS INCLUDED THE FOLLOWING SUBSECTORS:

- Electrical components and equipment if related
- Industrial machinery if related
- Construction materials and equipment
- Metals if related
- Services (architecture and engineering consulting services)

Table 2 below shows the turnover of the surveyed firms in the food-related and construction-related sector division.

TABLE 2: ANNUAL SALES TURNOVER IN USD BY (FOOD- AND CONSTRUCTION-RELATED SECTORS)

	Annual Sales Turnover (USD)		
	Below 250k	250k–1million	Over 1 million
Food-related sectors	25%	24%	51%
Construction-related sectors	36%	28%	36%

The quantitative data gives a general overview of private sector competency needs, and external and internal challenges that firms face and that could constrain their growth and engagement with jobseekers. The survey covers existing and anticipated business sector potential, SME competency needs and skills match issues (general outlook), SME labour absorption capacities and hiring practices, along with some information on the usage of the business ecosystem and support services.

To complement the quantitative analysis of sectors, skills gaps were highlighted and analysed across the 'promising sectors' category, as mentioned above (see also Qualitative Data, below).

SAMPLING METHODOLOGY

The firms chosen for the labour market assessment were selected through non-

probability quota sampling, whereby a number of entities within the population of active firms were purposely assigned to have a zero probability of being chosen, and the selected firms were selected to fit a pre-assigned quota distribution. This sampling method allows for the definition of a specific sampling frame, in which the focus is on firms with characteristics that complement the final purpose of the study. In the case of this skills gap analysis, those characteristics cover the firm's size, ensuring that they are all SMEs, as well as the selected SMEs' inclusion in one of the five main sectors: trade (wholesale and retail), manufacturing, agriculture, construction and services. The results of the analysis can therefore be generalized only for the population of firms that have the same set of specified characteristics.

The sampling process consisted of two phases. In the first phase, data was collected from published statistics and reports, with

the principal objective of specifying the final sampling frame. The second phase consisted of selecting the firms based on quota sampling.

Based on the secondary data available on SME sectors and labour distribution across the three different regions, the sector quotas were identified based on cross-sector labour force distribution rates. This sampling technique is a convenience sampling method, and was chosen by the research team as one relevant method to select SMEs for the study. Afterwards, a sample subselection of SMEs was performed, based on the three following criteria: 1) sector quota; 2) firm size; and 3) accessibility. It is important to note that the final sector distribution of SMEs does not perfectly fit the pre-assigned sector distribution quotas. This is largely due to the fact that one firm could be counted as working in several sectors at any one time, depending on the type of goods and services that it provides.

QUALITATIVE DATA

While the survey provides general guidance, qualitative data forms the main means of data collection for any deeper analysis of SME needs and skills gaps, employability patterns and sectors with absorption capacity, and the more contextualized approach that is necessary in all three regions. A total of 16 KII interviews and 15 FGDs were completed. The Leaders Consortium members and the TMU were consulted throughout the process, providing guidance on contacts for interviews, relevant reference documents and comments on the data collection tools.

THE QUALITATIVE DATA COVERS THE FOLLOWING:

- The skill gaps that need to be addressed to strengthen the human capital of SMEs ;
- The Barriers (related to skills, legal framework, cultural practices, etc.) hindering the private sector's engagement with jobseekers;
- The Experience and education required by private sector companies that exhibit absorptive capacity;
- Employability patterns preferred by the private sector;

- Hiring practices related to the employment of vulnerable groups such as women, youth and refugees;
- The hiring practices of SMEs, including the employment of Lebanese and non-Lebanese workers.

THE 19 KIIS IN THE THREE REGIONS WERE AS FOLLOWS:

- Seven KIIs in Tripoli: The Union of Traders, the Vocational Training Institute, a member of the Jewellery Traders Union, the municipality, and cultural heritage experts;
- Three KIIs in Bekaa: The Chamber of Commerce, an INGO, and a food production expert;
- Three KIIs in Mount Lebanon: The Vocational Training Institute, the municipality, and the Syndicate of Goldsmiths and Jewellery Designers;
- Six KIIs in Beirut: Two INGOs, a University Career Services Office, the National Office of Employment, the Ministry of Social Affairs and an environmental expert.

The 15 completed FGDs included eight to ten participants, noting that around 85% were in the specific priority sectors of food and construction. The FGDs were held with groups as follows:

- Three FGDs with employers in registered companies in the three regions;
- Three FGDs with employers in unregistered companies in the three regions;
- Two FGDs with women employees in Bekaa and Tripoli;
- One FGD with youth employees in Mount Lebanon;
- Three FGDs with male youth and female jobseekers in the three regions;
- Three FGDs with Syrian male and female workers and jobseekers in the three regions.

LIMITATIONS

AT THE LEVEL OF THE DESK REVIEW

- The data is contradictory: Available numbers and statistics related to the labour market differ across different sources.
- The data is not comprehensive: The same figures are very rarely available for a set of different continuous years, and many useful region-specific and sector-specific figures are not available.
- The data is not recent: Most numbers and estimates date to before or the beginning of the Syrian refugee crisis; the data also lacks key information (for example, regarding the size and scope of the informal sector).

AT THE LEVEL OF SAMPLE SELECTION

- Lack of motivation/incentive: Outreach to SMEs and stakeholders was easier in Tripoli and Bekaa than in Mount Lebanon, primarily because regional SMEs are more aware of and have more trust in INGOs; it was therefore easier to gain their trust and persuade them to participate in the study. SMEs and stakeholders were reluctant to participate in the study, mostly because they do not feel the interventions will result in anything meaningful, and they claim that many studies are being undertaken with no tangible results.
- Difficulty in reaching unregistered or informal firms: It was difficult to contact unregistered

SMEs; the researchers approached several such companies, but most of them refused to engage in the study for fear of being pursued for legal and taxation reasons. Therefore, the SMEs covered by the survey were predominantly in the formal sector.

- Sample size: The size of the sample was convenient given the limited data collection resources (mostly time - What do you mean?).

However, having a bigger sample would have resulted in more accurate results and analysis.

Furthermore, the results of the study cannot be used to make generalizations about the labour market or specific sectors in the three regions; instead, they can supply guidance and recommendations regarding the specific sample of firms.

AT THE LEVEL OF DATA COLLECTION AND ANALYSIS

- Informal/illegal practices during data collection: It was a challenge to capture practices that were informal or illegal, as some of the interviewees would conceal such activities.

3. POTENTIAL AND BARRIERS FOR SMES

The question of skills gaps is directly linked to the broader scope of the sectors within which SMEs function. Sectors, as characterized in this research, are at the core of the skills gap investigation for two reasons.

Firstly, looking at SME revenue growth within various sectors and assessing the labour absorption capacity allows for a more specific focus on the skills that will increase the

potential for employment within SMEs that have the potential to hire new workers. Secondly, the accuracy of the skills gap analysis is directly affected by the general framework of business sector specifications, including the barriers that SMEs face as well as the macro context within which SMEs thrive. For this reason, this section provides an outlook of SMEs and various sectors, specifically, their growth expectations and potential in terms of revenue

and labour absorption capacity. It also provides a description of SME interactions with key external factors related to government policy, the security situation, and access to resources, among others. The next section highlights the perceived impact on SMEs, particularly after the start of the war in Syria, which will also be discussed in this section. Finally, this section builds a bridge between potential subsectors and their needs in order to achieve growth and absorb labour.

Boxes 1, 2 and 3 at the end of this section provide a focus on three subsectors which exhibit promising potential for growth: cultural and heritage-related tourism, nursing, and jewellery production. Those sectors were chosen based on the research outcomes. The boxes provide an analysis of the subsectors' opportunities and challenges, and provide practical recommendations to help support the sectors based on their specific needs.

GROWTH EXPECTATIONS AND BARRIERS

The SMEs in the three regions that the analysis focused on are dealing with specific yet similarly uncertain and challenging conditions, which present opportunities for support and potential improvement of their environment.

GROWTH EXPECTATIONS

Despite the uncertain conditions, the survey showed expectations for enterprise growth accompanied with labour absorption capacity.

Firms were asked – among other questions – whether they anticipated business growth in terms of revenue growth over the next year.

Just over half of the firms (58%) in the survey reported that they expected to see growth in terms of revenues during the forthcoming year – as shown in Figure 4. It is important to notice that there were no significant differences between the three regions in this regard.

FIGURE 4: SME GROWTH (REVENUE) EXPECTATIONS

Firms Growth (Revenue) Revenue Expectation Next Year
(No. of firms & Share of total- All Regions)

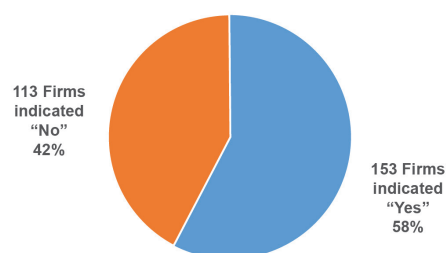
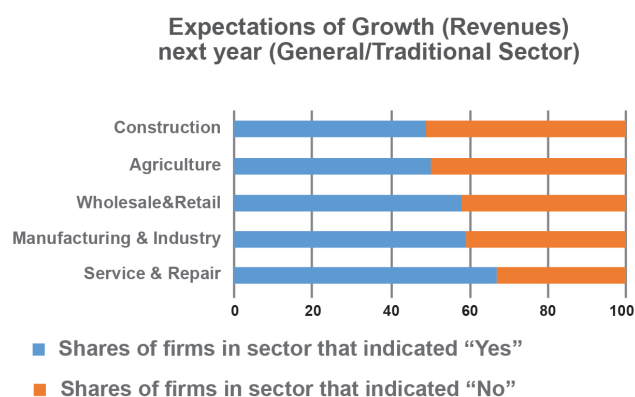


Figure 5 shows the share of firms within the general/traditional sector division that expected revenue growth in the next year, which is in line with macro trends. The service and repair sector, which includes healthcare services, education services, hotels, restaurants, software and computer services, technology technician services, among other subsectors, had the highest revenue growth expectation compared to other sectors. It was followed by the manufacturing and industry sector, which includes agro-industry, packaging, construction materials and equipment, among other subsectors. In the agriculture sector, which includes food and industrial crops, oil and oil seeds, livestock, and horticulture among other subsectors, half of the firms indicated that they expected to see revenue growth in the next year.

Turning to SMEs in the food-related and construction-related sectors, there is a slightly higher growth expectation in the former – 65%, compared to around 41% in the latter. This appears to be mostly driven by agro-industry, with 74% of the firms in that subsector indicating an expectation of revenue growth.

FIGURE 5: SME GROWTH (REVENUE) EXPECTATIONS PER SECTOR

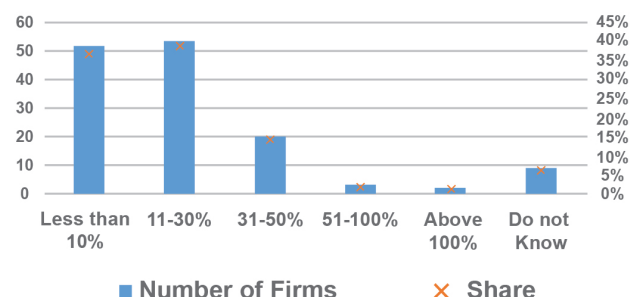


The survey also asked firms about the magnitude of the firm's revenue growth expectation.

Options included the following answers: below 10%, 11–30%, 31–50%, 51–100%, more than 100%, as well as an 'Do not know' option. The majority of firms (over 75%) expected this growth to be in the order of up to 30% over the next year when compared to the current year. There were no major differences in the size of expected

FIGURE 6: SIZE OF EXPECTED REVENUE GROWTH

Size of Expected Revenue Growth (All Regions)



revenue growth throughout the sectors.

Given the importance of growth expectations among firms, the survey also asked them to specify the reasons for either anticipating or not anticipating growth the following year. The most frequent responses are included in the following two tables for firms in the general/traditional sectors (Table 3), as well as firms in the food- and construction-related sectors (Table 4).

TABLE 3: REASONS FOR GROWTH EXPECTATION IN TERMS OF REVENUES FOR THE FOLLOWING YEAR (GENERAL/TRADITIONAL SECTORS IN ALL THREE REGIONS)

General/Traditional Sector	Reasons for anticipating growth (in terms of revenue growth next year)
SMEs in the services and repair sector (number of firms: 64)	Stability in terms of the country's political situation (20%)
	Successful working strategies (15%) [Some stated it as such, others said they have plans, some mentioned management, some said introduction of new equipment that can save time and increase production]
	Expansion (9%)
	Lebanese people spend money on their needs (7%)
	Increased demand due to the increase in population (5%)
	Based on past years' trend (5%)
	New strategy of focusing on the local Lebanese market (2%)
	Opening of new markets inside and outside Lebanon (2%)
	Expanding and working on a wholesale (2%)
	Foreign investment (5%)
	New administration (2%)
	New products (5%)
	Location between Beirut and Damascus (2%)
	Business development (2%)
	Better services provided (2%)
	Still new and growing fast (2%)
	High demand for new technology products (2%)

Wholesale and retail (number of firms: 66)	Stability (28%)
	Expansion (20%)
	Increased demand (12%)
	Successful working strategies (8%)
	The economy is at its worst right now (8%)
	Food is an essential product (4%)
	Because our prices are lower than others in the market (4%)
	Based on this years' trend (4%)
	Development of marketing department (4%)
	New line of production
	Took bank loans (4%)
	New management strategies (4%)
	New marketing strategies (4%)
	Name and experience in the market (4%)
	Plastic is becoming a more reliable material to use
Manufacturing and industry (number of firms: 51)	Expansion (22%)
	Increased demand (14%)
	Based on the past year's trend (12%)
	Stability (8%)
	Economic stability (6%)
	Advertisement plans (4%)
	New line of production (4%)
	Working in nearby countries (2%)
	Salt is a basic need (2%)
	Due to conditions in Syria (2%)
	Planned working strategies (6%)
	Export (2%)
	Increase in sales (4%)
	Plastic becoming a more reliable material to use (2%)
Construction (number of firms: 10)	Experts in the market/increased recognition in the market (20%)
	Based on last year's trend (20%)
	Due to Syrian crisis (20%)
	Few competitors (10%)
	Building sector is getting better (10%)
	New plans, advertisement plans (10%)
	Increased demand for new buildings (10%)
Agriculture (number of firms: 12)	Conditioned by political stability (24%)
	Expansion (24%)
	Increased recognition in the market (8%)
	Exports (8%)
	Increased demand (8%)
	Based on last year's trends (8%)
	There is always a demand; people will not stop gardening (8%)

According to the food and construction-related sector, expansion, security and political stability were among the most frequently cited reasons for revenue growth expectations, as shown in Table 4 below.

TABLE 4: REASONS FOR GROWTH EXPECTATION IN TERMS OF REVENUES FOR THE FOLLOWING YEAR (FOOD- AND CONSTRUCTION-RELATED SECTORS IN ALL THREE REGIONS)

Food- and construction-related sector	Reasons for anticipating growth (in terms of revenues next year)
Food-related sectors (number of firms: 68)	Expansion (19%)
	Security/political stability (17%)
	Advertisement and sales plans (2%)
	Agricultural domain doesn't stop/people will not stop gardening (2%)
	Lebanese spend money on their needs (2%)
	Increased demand (3%)
	As long as the situation is bad in Syria, exporting will be dependent on us (3%)
	Based on past year's trend (9%)
	New line of production/new investment (3%)
	Improvement in factory and sales (3%)
	Foreign investment (3%)
	Because of bad economic and political conditions in Syria (2%)
	Increased recognition in the market (2%)
	New strategy of focusing on Lebanese market only (2%)
	New markets and products (2%)
	We are still new and growing fast (2%)
	Higher demand for fresh and organic food (2%)
	Successful work strategies (2%)
	Strategic location between Beirut and Damascus (2%)
	Projects funded from outside Lebanon (2%)
	New administration (2%)
	Working on marketing (website) (2%)
	Salt is a basic need
	Company always work to improve
Construction-related sector (number of firms: 20)	Security/political stability (20%)
	Increase in construction/buildings/building products (20%)
	Expert/recognized in market (10%)
	Based on last year's trends (10%)
	Working in nearby countries (5%)
	Few competitors (5%)
	High demand for new technology products (5%)
	Expanding (5%)
	New products (5%)
	Better advertisement (5%)
	Planned working strategies (5%)

Expansion was among the top reasons cited among the SMEs that were expecting revenue growth. 24% of firms in agriculture, 22% in manufacturing and industry, 20% in wholesale and retail, and 9% in the services and repair sector cited expansion as the reason for their growth expectations. Increased demand was another less frequently cited reason among SMEs, with 14% of manufacturing and industry SMEs, 12% of the wholesale and retail SMEs, and 5% of SMEs in the repair sector citing this factor.

Interestingly, around 20% of SMEs in the services and repair sector cited political stability as the reason for anticipating growth. In the wholesale and retail sectors, 28% of SMEs cited stability as a reason for expecting revenue growth next year. Given the apparent contradictory responses,

instability is cited as one of the primary barriers in another question, it is possible that SMEs justify their growth expectations in the sense that they expect revenue growth if there is stability next year. This may explain the relatively high expectations given the economic outlook in the country. Furthermore, relatively few firms based their revenue growth expectations on the past year's trends, which may further indicate that such growth expectations may be partially inflated.

Nearly half of the firms that did not expect revenue growth next year cited the political and security situation, as shown in Table 5 below. This supports the notion that SMEs are expecting such revenue growth conditional on the prevalence of security and political stability.

TABLE 5: REASONS FOR A LACK OF GROWTH EXPECTATION IN TERMS OF REVENUES FOR THE FOLLOWING YEAR (ALL SMES IN THREE REGIONS)

	Reasons for not anticipating growth (in terms of revenues next year)
All firms that responded with no growth expectation (number of firms: 106)	Political and security situation (49%)
	Competition (6%)
	Low purchasing power (6%)
	Because of the Syrian crisis, the road to the Gulf is closed (4%)
	Based on past years' trends (3%)
	Location not convenient (2%)
	Decreased demand (5%)
	Weak market (3%)
	Syrian crisis (2%)
	Lack of government investment in infrastructure (1%)
	No programmes to assist companies (1%)
	Travel of staff (1%)

EXPECTATIONS OF OVERALL SECTORAL GROWTH

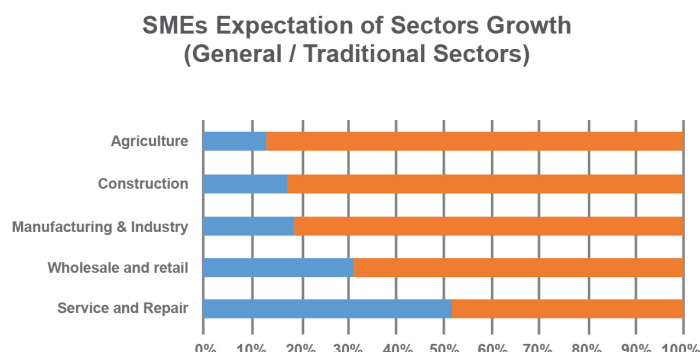
The general expectations of sector growth among firms (not necessarily the firm's own sector), were lower than revenue growth expectations that were analysed above.

The figure below shows the expectations of growth within other sectors by firms within the general/traditional sectors.

The highest growth expectations were

anticipated for the service and repair sector, followed by wholesale and retail.

FIGURE 7: SME EXPECTATIONS OF SECTOR GROWTH



SECTORS WITH CURRENTLY LIMITED LABOUR ABSORPTION CAPACITY

Key informants were asked to note the sectors that have a limited labour absorption capacity. These included:

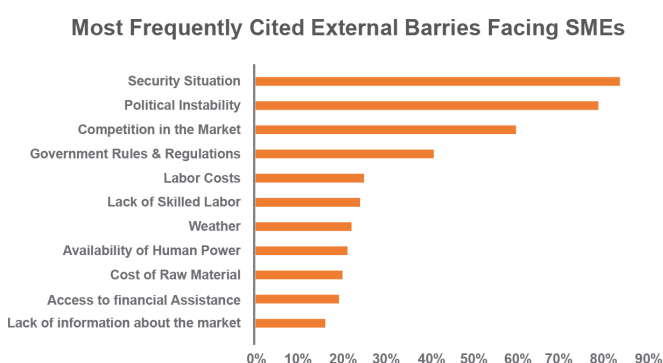
- The car repair sector, which is already saturated with an over-supply of labour, especially in Tripoli and Mount Lebanon;
- Furniture production, metal production, and carpentry, which are shrinking due to competition from imported goods primarily with recent imports of lower cost furniture from Turkey and Malaysia, despite the 'sector protection policy' implemented by the Lebanese government, in all three regions;
- The textile industry, which is shrinking due to a decline in demand and import competition, especially in Tripoli and Mount Lebanon; and
- The tourism sector, which is negatively impacted by violent incidents, negative media coverage and lack of investment. Tourism is affected mostly in the Tripoli and Bekaa regions. The subsector relating to cultural heritage was, however, mentioned as a promising one, if well-supported. It should be noted that regional festivals could have seasonal labour capacity in the lead-up to such events, which could temporarily relieve some labour supply pressures (see Box 1 below).

EXTERNAL BARRIERS

Having looked at growth expectations among firms, the survey asked firms about the top five external challenges that impede their business the most. The vast majority of firms (over 75%) responded that the security situation and political instability are among the main challenges they face. Over half of the firms highlighted the challenge of market competition. This was followed by government rules and regulations (41%), then labour costs (25%) and a lack of skilled labour (24%). Indeed, key informants confirmed these external constraints, and highlighted especially the negative impact of

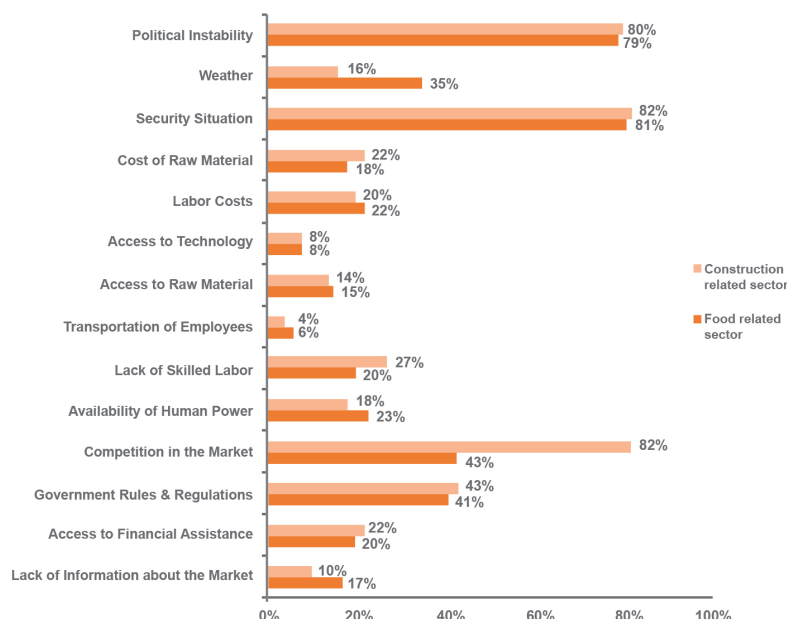
border closures on business. The responses concerning barriers were consistent between SMEs in the three regions.

FIGURE 8: SME EXTERNAL CHALLENGES



Given these external constraints, and since an improved security situation in the country is beyond the control of the Leaders Consortium members, it is advisable to focus on the challenges that can be ameliorated, such as improving SMEs' productivity and competitiveness and directly providing or supporting training in promising sectors that have emerged through the qualitative data collection. As mentioned before, all the promising sectors are analysed throughout the report.

FIGURE 9: SME EXTERNAL CHALLENGES, FOOD AND CONSTRUCTION



PERCEPTION OF THE IMPACT OF THE SYRIAN CRISIS

There is a marked difference in the perceived impact of the Syrian crisis on business in the three regions covered by the survey. In the Bekaa, 70% of the firms surveyed reported a positive impact, and an additional 40% reported no impact. In Mount Lebanon, around half of the firms reported a perceived negative impact on their business from the Syrian crisis, with less than 10% reporting a positive perceived impact. In the North, the perceptions were the most mixed – around 30% of firms reporting a positive, negative and neutral impact. Reasons for the perceived negative impact varied between insecurity and increased competition

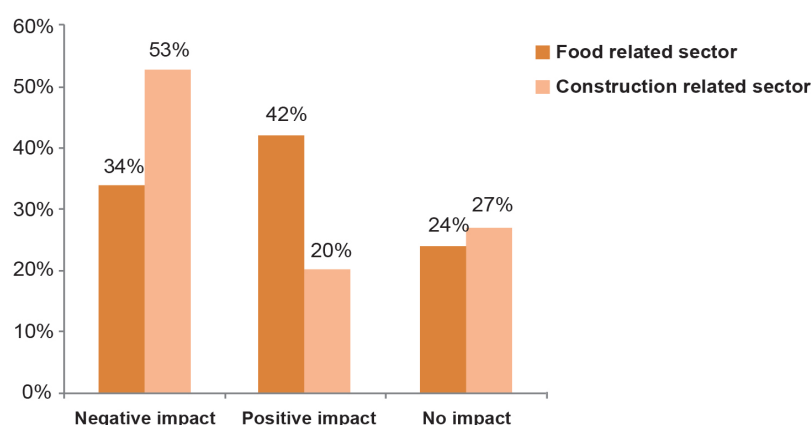
to reduced sales and lower cross-border exports (the latter mainly in the Bekaa and the North).

As for those that perceived a positive impact, reasons included increased overall demand from customers and easier access to Syrian labour.

There were no major variations in the reasons given by SMEs in different regions in terms of the impact of the Syrian crisis on business.

However, businesses that mentioned that there was an increased demand as a result of the Syrian crisis mainly referred to the increase in population and the resulting need to meet their basic requirements, alongside an increase in the number of INGOs and military personnel in the region.

FIGURE 10: PERCEIVED IMPACT OF SYRIAN CRISIS ON BUSINESS, FOOD AND CONSTRUCTION



PROMISING SECTORS WITH SKILL GAPS

The qualitative data collection contained considerable inquiry into sectors with potential growth. In interviews with key informants, as well as in FGDs, we inquired as to which sectors or subsectors interviewees and discussion participants expected to see growth in, along with labour absorptive capacity. The four sectors or subsectors in Table 6 below were highlighted as promising or having potential, as well as having a gap in the skills required by SMEs. For each promising sector raised through the qualitative data collection, we highlight in which regions it is applicable, and add any region-specific highlights.

In discussion with a key informant in a regional development organization, renewable energy

and oil and gas were highlighted as having potential for growth. However, since it would require longer-term support and investment, we exclude it from analysis as it is beyond the programming time frame for the Leaders Consortium members. That said, it is noted as part of the advocacy recommendations in the final chapter.

It is noted that beauty care was not suggested as a promising sector in any region, although there was a relatively minor acknowledgment of the successes of programmes targeting the sector. Some interviewees mentioned that the beauty sector is saturated due to the number of skill development programmes that have been provided for women in the region.

TABLE 6: PROMISING SECTORS BASED ON THE QUALITATIVE DATA COLLECTION

Cultural heritage-related tourism (including crafts)	<p>APPLICABLE REGIONS: TRIPOLI, BEKAA</p> <p>In Tripoli, the need to improve productivity for the old crafts subsector, including copper working, pottery and soap manufacturing, was highlighted. There is a need for the adaptation to innovative designs and the setting of considered marketing strategies to create and meet an increasing demand for this niche sector in both regions.</p> <p>Key informants in Tripoli, including actors from the Municipality of Tripoli, the Tripoli Traders' Union and UNDP's socio-economic department also noted the potential for cultural heritage-related tourism and services, including events, tours and activities capitalizing on local heritage sites, etc. Here the focus was on improving infrastructure, and using the support of media to dispel security-related fears. The same findings were found in the Bekaa as the interviewed actors praised the tourism sector as having the potential for growth and new jobs.</p>
Nursing and childcare services	<p>APPLICABLE REGIONS: TRIPOLI, BEKAA AND MOUNT LEBANON</p> <p>Nursing was highlighted as a promising sector with regard to labour absorption capacity in all three regions, particularly in Tripoli. Several key informants expressed the importance of the nursing sector, and the need for nurse assistants in particular, especially those that the hospital sends out for home assistance services. There is also the potential to build upon existing official curricula to ensure compatibility and complementarity in terms of learning paths for trainees.</p> <p>The childcare sector is important, particularly because it encourages working women and aids them in their plans to work and support their families.</p>

Jewellery production	<p>APPLICABLE REGIONS: TRIPOLI AND MOUNT LEBANON</p> <p>In Tripoli and Mount Lebanon, informants highlighted the need for new technologies to enable local producers to improve their ability to compete with imported goods. This issue poses a serious threat to the industry with the improvement of technologies available to external companies. The current cost of production is forcing producers to sell at higher prices than imported goods. New technologies are needed for more efficient production, and for better quality at lower cost.</p>
Food-related sectors	<p>APPLICABLE REGIONS: TRIPOLI, BEKAA AND MOUNT LEBANON</p> <p>The focus in both Mount Lebanon and Tripoli was mostly on food services, including restaurants and hotels.</p> <p>In the Bekaa, in addition to food services, there was a focus on agriculture, the agro-food industry, alternative agricultural methods, food packaging, retail and wholesale, as sectors of expected growth among key informants and FGDs. They noted the importance of the introduction of new methods and technologies from a productivity perspective as well as the need to widen product ranges. This was consistent across regions.</p>
Construction-related sectors	<p>APPLICABLE REGIONS: TRIPOLI, BEKAA AND MOUNT LEBANON</p> <p>There was a general agreement among different stakeholders with first-hand experience in the labour market that construction-related sectors (including but not limited to plumbing, masonry, tiling, etc.) face a stable and growing demand, especially with respect to small construction services rather than large enterprises. Even though the majority of workers in this field work independently rather than within an SME context, it is important to consider a capacity-building programme that supports individual workers and jobseekers, especially because knowledge sharing in construction is harder in this work environment than in other sectors. The main reason is that, when a more junior worker is partnering with a senior worker, the senior worker often fears that the junior will learn the trade and compete with him/her. It is thus important to consider alternative on-the-job training or internship strategies in the field of construction that take into consideration the obstacles to knowledge-sharing.</p>

FOOD-RELATED SECTORS

These sectors tend to be labour-intensive, with a high labour turnover rate due to unfavourable work conditions and relatively low wages, the combination of which has resulted in Syrian and migrant workers competing for and replacing Lebanese workers less willing to accept poor working conditions. That said, refugees with low-skill profiles are most likely competing with other migrant workers rather than Lebanese workers given the segmentation of the labour market.

Boxes 1, 2 and 3 provide a focus on three subsectors of promising growth: cultural and heritage-related tourism, nursing and jewellery production. Those sectors were chosen based on the research outcomes as well as the Leaders Consortium's recommendation. The boxes provide an analysis of the subsectors' opportunities and challenges, and provide practical recommendations to help support the sectors based on their specific needs.

BOX 1: PROMISING SECTORS: CULTURAL HERITAGE-RELATED TOURISM

APPLICABLE REGIONS: TRIPOLI, BEKAA

Beyond promoting cultural heritage as an element of national identity and promoting education centred on cultural heritage, capitalizing on a city's cultural heritage endowments for tourism can be the source of economic returns, and promote sustainable local development. Increasingly, cities are shifting their focus to cultural heritage in their national development planning. On a bilateral basis in Europe, the Archimedes project involved European and Mediterranean cities, including Beirut and El Mina, with the aim of regenerating cultural heritage areas in cities and promoting innovative and sustainable economic development (Aston Center 2011). In Jordan, the Zikra Initiative organizes tourism exchange trips whereby Amman residents visit local communities in rural areas and engage in creating positive experiences between communities, investing proceeds from the trip in rural communities through micro-loans (Zikra Initiative). Key to the success of revenue growth and job creation possibilities of such initiatives, like many project-based approaches in development, is that the programme is established such that it sustains itself beyond the life of the funded project.

Lebanon is endowed with a wealth of cultural heritage, and has an opportunity to benefit from rebuilding and using its cultural heritage assets to generate economic returns, and by extension, employment opportunities. Cultural and music festivals in Baalbek, Beiteddine and other areas are organized around cultural heritage sites, and tend to attract many local residents and tourists from neighbouring countries. It is noteworthy that key informants specifically highlighted that much could be done in terms of renovating/restoring old buildings, such as repurposing old houses to create local bed and breakfast establishments, restaurants, and rehabilitating old hammams. While these are not directly skills-related, regenerating cultural-related tourism could provide for livelihood opportunities, and as such could be considered as intervention options for the Leaders Consortium members.

IMPLICATIONS AND RECOMMENDATIONS FOR THE LEADERS CONSORTIUM MEMBERS

Key informants suggested that the following skills were needed within cultural heritage-related activities. Consortium members could consider providing relevant training in the following areas:

- Crafts and events/festivals: Skills related to crafts, including handicraft design, soap making, glass crafting, and clay work are needed as these subsectors have potential for growth and preservation, according to the qualitative data. It was noted that innovative and modern designs that move away from outdated and overused designs are needed; in addition, new materials are required to develop better quality crafts to appeal to wider markets.

Examples cited included new fabrics and carving styles, including Arabic calligraphy. The key informants highlighted that festivals or exhibitions could be organized around crafts, such as a soap festival. Khan eh Askar in Tripoli could potentially become a centre for handicrafts training and a permanent exhibition. Events using sound and light could also attract visitors to both the citadel in Tripoli and to Baalbek. Music festivals create seasonal jobs for the youth as well as permanent jobs for local community members who are engaged in preparations

for the yearly event. The latter thereby offer the potential for local economic development, along with the related advantages that surrounding SMEs would benefit from, associated with the arrival of tourists to such attractions.

- Food Tourism and Tours: Food from Tripoli was identified as having the potential to be marketed on a large scale and to markets far away from the area. Food tourism was highlighted as a growing sector, and one that could be further encouraged with the provision of food tours. Developing links with existing food markets, such as Souk el Akel, could be supported to encourage knowledge transfer from other areas.
- Tour Guides: Tour guides across the regions, particularly tour guides who would lead walking tours around the cities, were seen as having great potential. It is to be noted that setting up proper and unified signage that is geared to walking tours would also be needed.
- Boat-related Skills: Skills training for boat tour operators and boat maintenance work were also highlighted as lacking.

BOX 2: PROMISING SECTORS: NURSING

APPLICABLE REGIONS: TRIPOLI, BEKAA AND MOUNT LEBANON

Participants in FGDs, particularly among jobseekers and employees, perceived that there are significant opportunities for nursing assistants, noting that graduates of short-term to medium-term nursing training are able to access employment opportunities relatively quickly. This demand was identified by IECD through their contact with several hospitals in Tripoli and their assessment of the need for nurse assistants, especially those sent by the hospitals to assist patients in their houses. In an interview with a key informant in the National Employment Agency (NEO), the geographical aspect of the skills gap was highlighted with some jobseekers turning down jobs that would require a commute to another region. These perceptions are consistent with the literature that points to a relative shortage of nurses in Lebanon, particularly in rural areas, which is primarily driven by poor retention linked to insufficient job satisfaction (El Jardali et al. 2013).

The recent accreditation system imposed by the Ministry of Health on all public dispensaries (it is optional for private and public hospitals) has led to a more organized internal human resource structure in health facilities and an encouraging environment for proper absorption of new workers with the required skills.

IMPLICATIONS AND RECOMMENDATIONS FOR THE LEADERS CONSORTIUM MEMBERS

- Provide nursing training to widen the pool of available candidates in light of the skills gap and shortage of workers.
- Promote the retention of nurses by partnering with employers to support non-monetary incentives.
- Work on changing negative perceptions of nursing among the youth, through awareness campaigns and orientation sessions.

BOX 3: PROMISING SECTORS: JEWELLERY – OPPORTUNITIES, SKILLS AND INVESTMENT

APPLICABLE REGIONS: TRIPOLI AND MOUNT LEBANON

To better illustrate the opportunities and skills gaps in the jewellery sector, one of the informants brought to light that the sector has been facing difficulties over the past decade primarily as a result of higher gold prices, as well as competition from abroad and from traders who became manufacturers. One key informant in Tripoli noted that the city has over 150 jewellery shops, as well as major design and production factories, yet the sector is struggling because it currently lacks design skills, creativity and innovation among workers. Along with another informant, he identified one major problem as the lack of modern technology and machinery. Tripoli-based jewellers and traders incur relatively high costs, since they have to use Beirut-based workshops that have the necessary machinery.

SECTOR COMPETITIVENESS: Investing in the provision of specialized machinery, along with the required training, can enable increased competitiveness of the sector, and by extension, increased hiring potential. One suggestion from the Syndicate is to create a facility equipped with machines, including gold cast machinery and laser welding and laser cutting, which would serve the community of gold producers at low rates. The facility could provide training on the use of the machinery, and could even become sustained through its own revenues in the medium term.

HIRING AND SKILLS: Hiring is mostly contractual in the sector, and male-dominated, particularly in the production process, favouring migrant workers from neighbouring Syria, as well African and Asian workers. Women that are hired in the sector are primarily in front-facing positions. Given the low wages for workers in the sector, even compared to wages in the past, it is perhaps unsurprising that youth are not drawn to the sector. With regards to vocational training, the Syndicate representative noted that there is need for a comprehensive training centre.

IMPLICATIONS AND RECOMMENDATIONS FOR THE LEADERS CONSORTIUM MEMBERS

- Support the procurement of specialized machinery and help provide the training needed to operate the machinery. The workshop or facility could provide vocational training and art workshops for workers in the sector. To enable access by Tripoli-based jewellers that need to use such workshop services, transportation costs could be offset.
- Support the marketing of local products through the provision of marketing advice, either at the workshop or in another setting.
- Support the expansion to a larger customer base and new markets through improved linkages with international markets by, for instance, establishing exchanges between local producers and international jewellers and firms. This has been implemented by development organizations in other contexts, such as in Afghanistan by the United States Agency for International Development, and could be considered in Lebanon.

4 HIRING PRACTICES, PREFERENCES AND SKILL GAPS

This section analyses the hiring practices of SMEs, and where relevant, provides the analysis by sector and/or by region. It begins with a discussion of existing hiring practices, including SMEs that are currently hiring. It then analyses the hiring of women, youth and non-nationals, focusing on Syrian workers. An analysis of the main internal challenges and human resource-related issues is provided subsequently.

HIRING PRACTICES: FULL TIME EMPLOYEES, PART TIME EMPLOYEES, AND INTERNS

Over the past three years, the majority of firms in the survey reported having hired to fill both full-time and part-time positions (Tables 7 and 8). In the food- and construction-related sectors, the share of SMEs which reported hiring full-time employees is 60%. By region, the shares are as follows: 54% of SMEs in the Bekaa, 71% of those in the North and 69% of those in Mount Lebanon.

TABLE 7: PERCENTAGE OF SMES THAT HIRED FULL-TIME EMPLOYEES OVER THE PAST THREE YEARS (SECTOR AND REGION)

	Bekaa	North	Mount Lebanon
General/Traditional Sectors			
Services & Repair	62%	64%	56%
Wholesale & Retail	63%	75%	76%
Manufacturing	49%	80%	79%
Construction	40%	75%	67%
Agriculture	46%	67%	75%
Food- and Construction-related sectors			
Food-related sectors	63%	72%	89%
Construction-related sectors	44%	67%	71%

For part-time positions, 32% of SMEs in the Bekaa, 42% of those in the North and 45% of those in Mount Lebanon reported having hired for part-time positions, as shown by Table 8 below.

TABLE 8: PERCENTAGE OF SMES THAT HIRED PART-TIME EMPLOYEES OVER THE PAST THREE YEARS (SECTOR AND REGION)

	Bekaa	North	Mount Lebanon
General/Traditional Sectors			
Services & Repair	32%	49%	50%
Wholesale & Retail	53%	39%	49%
Manufacturing	34%	40%	58%
Construction	67%	75%	42%
Agriculture	33%	33%	50%
Food- and Construction-related sectors			
Food-related sectors	38%	42%	63%
Construction-related sectors	46%	67%	50%

As for the composition of the existing workforce within SMEs, Table 9 shows the division between full-time and part-time positions according to ranges of employees currently working.

TABLE 9: SMES ACCORDING TO THE EXISTING EMPLOYEES – FULL-TIME AND PART-TIME (SECTOR AND REGION)

	Full-time currently working				Part-time currently working			
	Fewer than 10	10–50	50–200	Over 200	Fewer than 10	10–50	50–200	Over 200
Part-time currently working								
Services & Repair	46%	41%	13%	1%	75%	21%	4%	0%
Wholesale & Retail	49%	41%	10%	1%	81%	12%	6%	1%
Manufacturing	43%	46%	10%	1%	70%	21%	8%	1%
Construction	71%	29%	0%	0%	81%	19%	0%	0%
Agriculture	39%	52%	9%	0%	62%	29%	10%	0%
Food and Construction Related sectors								
Food-related sectors	35%	53%	10%	2%	61%	27%	11%	1%
Construction-related sectors	65%	31%	4%	0%	88%	10%	2%	0%

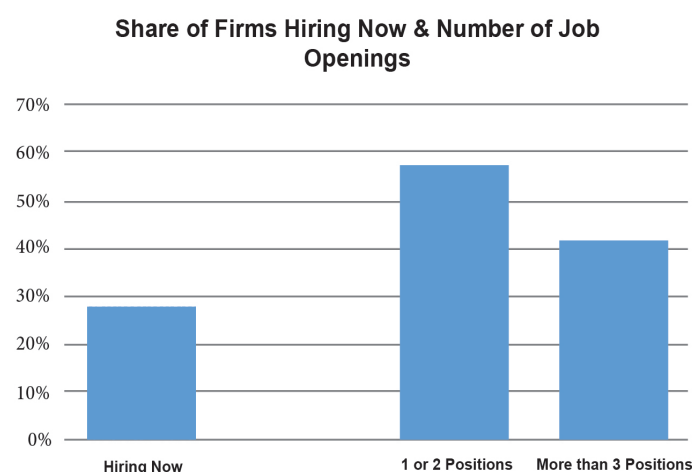
Focus group discussions highlighted that part-time employment is more feasible for some job types, such as waiters and sous-chefs in the food-related sector, since it presents opportunities for students to join the labour market and start developing their experience and, since those positions are based on shifts, it would be easier to hire part-time employees to cover shorter shifts. There was also a perception that there is

a preference among jobseekers and employers for full-time employment. From the perspective of jobseekers, the reason for this preference is primarily job security and benefits, while employers mentioned that full-time employees save them time and effort compared to training several part-time employees, besides the benefits from the additional commitment on the part of the employee of a full-time position.

SMES THAT ARE CURRENTLY HIRING

A significant share of the SMEs in the survey (28%) reported that they are hiring (at the time of the interview), and this is consistent across all three regions, as shown by Figure 11. Analysis of current hiring trends by sector yields an interesting result: none of the firms solely operating in the agriculture sector reported that they are currently hiring, which could be down to seasonal effects, although SMEs that operated in both agriculture and the wholesale sector were hiring. This result – relatively higher hiring if the SME operated in more than one sector – does not appear to manifest in other SMEs operating across multiple sectors. This could possibly be a sign of seasonal fluctuations in the demand for seasonal agricultural workers during summertime.

FIGURE 11: SHARE OF SMES CURRENTLY HIRING, AND NUMBER OF JOB OPENINGS



Data on food- and construction-related sectors shows that, for both sectors, around 70% of the SMEs that are currently hiring reported one to two job openings, while 30% of the SMEs reported three or more job openings.

SMEs reporting that they are currently hiring appear to be primarily driven by anticipated business growth and expansion plans rather than turnover. Among the SMEs that reported as currently hiring, 66% said that they anticipated business growth in the next year, while 86% reported that they are planning to expand.

Within the SMEs with plans for expansion, 68% stated that they plan to recruit new staff to address emerging tasks related to expansion.

With respect to sector-specific data, 32% of SMEs in food-related sectors expressed that they are hiring now, while only 20% of SMEs in construction-related sectors did so. The turnover rate was low, with 67% of those firms that are currently hiring showing a turnover rate of less than 5%. It is also noteworthy that, in food-related sectors, the positions most prone to high turnover are those requiring low-skills (including, for example, clerical workers and waiters).

Yet among those currently hiring, 63% of SMEs in the Bekaa (15 firms), 68% of SMEs in the North (19 firms), and 84% of firms in Mount Lebanon (16 firms) reported facing challenges to hiring the workers they need. Among the firms that are currently hiring, and that expressed dissatisfaction with the skills of applicants, the survey asked that they specify the exact skills needed. As this is a subgroup of an already small group of firms reporting to be hiring currently, we treat these responses as qualitative. In management, there appears to be a skills gap in client communication and general managerial skills, and work ethics. In marketing, firms highlighted the lack of sales skills, packaging skills, advertising skills, and in one case, lack of information on markets. Within finance and accounting, respondents identified accounting, budget management, and financial reporting as areas of skills deficits. Work ethics

appeared again under operations skills, which could indicate a gap in expectations between employees and employers regarding working hours and diligence.

HIRING AS PART OF SME EXPANSION PLANS

The survey asked firm representatives whether they have expansion plans. Across all three regions, around 65% of the firms indicated that they did have expansion plans. Given the security and economic challenges facing the country, and the barriers to growth, the proportion of firms considering expansion may appear too large. This may partially be attributable to the breadth of the question, whereby expansion plans included new products, services, technologies, expansion and switching to new markets. As such, this share ought not be interpreted as increased production, but rather plans for a different range of products, services, or production methods and targeted markets. When interpreted more broadly, we find the share more realistic, and that it reflects dynamism in SME operations.

When looking at food- and construction-related sectors, the following was deduced: 65% of firms working in food-related sectors indicated that they did have expansion plans. These respondents were mainly working in agriculture (food crops, viticulture and dairy products), manufacturing (agro-industry), wholesale (food packaging, food and beverage retail), and services (hotels, restaurants and food related tourism). Of the firms working in construction, 96% said that they had expansion plans. These mainly worked in building materials and fixtures, heavy construction and industry (construction-related industrial machinery, construction-related metals, construction material and equipment).

Among firms who anticipated business growth and had expansion plans (53 food-related firms; 16 construction-related firms) their plans were as follows:

- 68% of firms working in food-related sectors said that they will train available staff as part of their expansion plans. These firms worked in food crops, viticulture, dairy, livestock, agro-industry, food packaging, food and beverage retail, hotels, restaurants and food-related tourism. 43% mentioned internal reorganization; these worked in livestock, dairy, agro-industry, hotels and food related tourism. 49% indicated that they will hire new staff; these respondents worked in food crops, oil and oil seeds, livestock, dairy products, agro-industry, food packaging, food and beverage retail and food-related tourism.

- 56% of firms working in construction-related sectors said they will train available staff. These firms worked in building materials and fixtures, heavy construction, electrical components related to construction, and construction machinery. In the field of architecture/engineering consulting services, 44% mentioned internal reorganization; these firms worked in heavy construction, electrical components, industrial machinery related to construction, and construction material and equipment. 50% mentioned recruiting new staff; these companies worked in building materials and fixtures, construction-related electrical components, construction material

and equipment, and architecture/engineering consulting services.

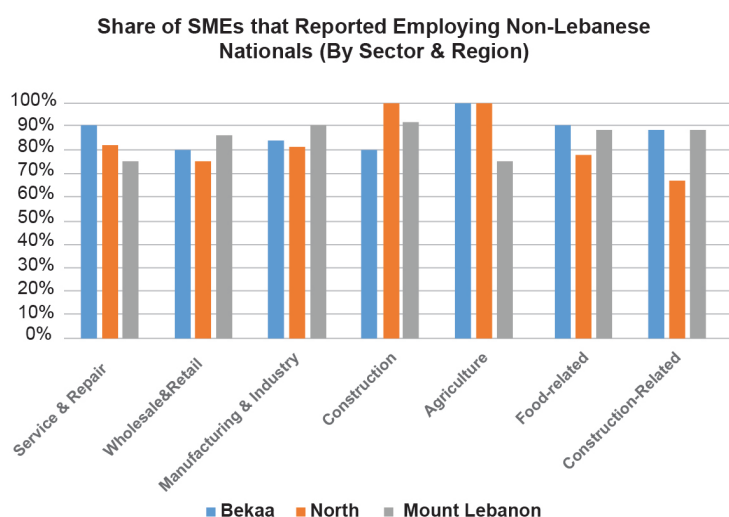
HIRING PRACTICES: NON-LEBANESE AND SYRIAN WORKERS

Hiring non-Lebanese appeared to be a common practice in all regions and all sectors. As Figure 12 shows, the vast majority of SMEs reported that they employ non-national workers, including Syrians and Palestinians. In the Bekaa, the highest share of SMEs reporting that they employed non-nationals was in the agriculture sector, followed by services and repair, then equally manufacturing and construction. In the North, all of the SMEs in the construction and agriculture sectors reported employing non-nationals, followed by over 80% in services and repair (mostly restaurants). In Mount Lebanon, around 90% of SMEs in construction and 90% of those in manufacturing/industry reported non-national hiring.

Further research into secondary data confirms that, overall, 45% of Syrian refugee workers work in unskilled jobs: they form the majority of agricultural workers, building caretakers, drivers and domestic workers. 43% work in semi-skilled jobs such as carpeting, metal work and food processing. On the other hand, professions such as teaching, financial management and trade are performed by skilled workers. Tripoli contained the most skilled workers compared with the Bekaa, which has the highest share of unskilled workers.

The skill profiles of Syrian refugees ranges from low to semi-skilled workers, and according to the World Bank, the majority work in the construction and agriculture sectors. This is consistent with the sectors that they legally are allowed to work in. This is confirmed by the survey that was conducted for this report, both from the actual hiring of non-nationals by sector and the perceptions within the top sectors that employ Syrians. Across all governorates, and consistent with other sources, agriculture and construction were the sectors that hired the most Syrians, followed by the services and

FIGURE 12: SHARE OF SMES EMPLOYING NON-LEBANESE NATIONALS, BY SECTOR AND REGION



repair sector. Additionally, sources estimates that 47% of Syrian refugees are economically active in the informal sector, mostly in the services sector (almost 40%), other personal and domestic services (27%), agriculture (24%), commerce (15%) and construction (12%).

The survey further inquired about the reasons why SMEs hire Syrians, in order to better understand whether it was primarily driven by a skills gap or due to their relative willingness to accept lower wages compared with their Lebanese counterparts. Indeed, over 80% of firms in all governorates responded that lower wages were a primary reason for hiring Syrians, along with 50% highlighting the unwillingness of Lebanese nationals to do the job in question.

The survey also asked a question relating to wage equality between Syrian and Lebanese workers.

For the same skill sets and qualifications, in the Bekaa and the North, SMEs were almost equally divided between those which believed that Syrian and Lebanese workers should be paid equally (particularly in services and repair, and wholesale and retail) and those who believed Syrians should be paid less.

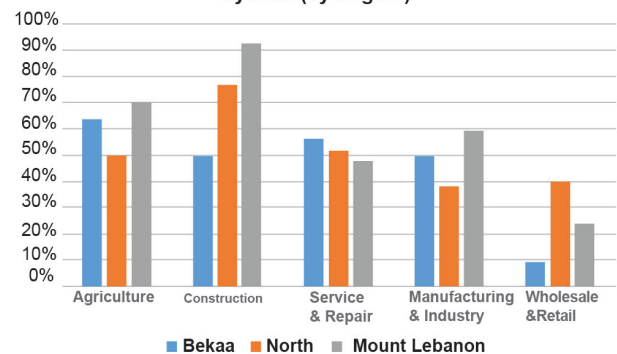
In the construction-related subsectors in the Bekaa and Mount Lebanon, around 80% of SMEs in each region reported that Syrian workers should be paid comparatively less. It appears that across all sector divisions, the majority (above 70%) of SMEs in Mount Lebanon reported that they believe that Syrians should be paid less than their Lebanese counterparts.

The willingness to hire Syrians was consistent sectorally (based on traditional sector division), as well as across the food-related and construction-related sectors. In some sectors and subsectors, willingness to hire Syrians precisely because they could be paid lower wages was even higher. In the services and repair sector, which in the previous analysis showed the highest relative growth expectations, almost 90% of firms cited this reason. In one example among the food subsectors, over 90%

of firms working in food crops attributed their willingness to hire Syrians to their relatively low wages. In the building materials and fixtures subsector, this share was 75%.

FIGURE 13: PRECEPTION OF THE TOP SECTORS THAT WILL EMPLOY SYRIANS (BY REGION)

Figure 13: Perception of the Top Sectors that will Employ Syrians (by Region)



While wage data for Lebanon is scarce, some relatively recent survey data on private sector wages indicate that the average median monthly earnings was approximately US\$616 in 2010.

Those employed in the formal private sector, as well as the self-employed, were found to have above-average earnings (US\$667) and those in the informal economy had below-average earnings (US\$442). In other words, approximately half of those in informal employment earned less than the legal minimum wage of US\$450 per month. In addition, some portions of those formally employed and self-employed likewise have earnings below the monthly legal minimum.

The survey results offer an indication that the presence of INGOs and their support of Syrians did not have a positive impact on the overall willingness to hire them. The reasons for this are unclear. It is possible that INGO support mainly smoothens consumption of goods rather than livelihoods, or possibly due to the imposition by Lebanese policy makers of employment restrictions among Syrians (see also Box XX below on livelihood programming that can benefit both Syrians and host communities).

In FGDs, Syrian participants did show a lack of knowledge and clarity on which sectors they are legally allowed to work in.

From FGDs conducted with employees who held a vocational training or vocational experience, it became clear that there are limited job opportunities and considerable competition with Syrian workers in all sectors and regions.

From the perspective of employers, while Syrian workers are enabling them to incur lower costs, their willingness to accept lower wages appears to be driving wages down, which is being interpreted as increased competition for existing, or newly created jobs in the low-skilled sector. It would appear that raising the wages of Syrian workers could result in discouraging employers from hiring them, at least in the short term, and would be likely to increase informal employment.

Based on FGDs held with Syrians, including workers, as part of this study, participants stated that they face discriminatory practices from their employers and within their workplaces.

Many workers are forced to accept such discriminatory practices due to desperation and the lack of other income-generating activities.

Indeed, and as highlighted by Oxfam's Right to a Future report in late 2015, Syrians in Lebanon face dire situations, particularly linked to their employment restrictions in host countries. As this report makes clear, it is crucial for development efforts to focus on enabling Syrians to contribute economically to their host communities, as well as, in the future, to their home communities, in a context of safety and dignity. Since the adoption of restrictive residency regulations from the beginning of 2015, Syrians have been facing difficulties renewing their residencies, which puts them in precarious situations and subject to exploitation.

HIRING YOUTH

According to the survey, youth aged 19–22 represent one of the smaller demographics among employees. The North stands out somewhat with regards to their hiring of younger employees, with around 10% indicating they

have some employees in the 16–18 age bracket. Additionally, 67% of firms in the North region indicated the presence of 19–22-year-old employees within their workforce. This presence was strongest in the services and repair sector (75%), which includes subsectors such as education services, healthcare services, hotels and restaurants, among others.

In Mount Lebanon, 75% of firms reported having employees in the 22–30 age group, which can be considered a wider bracket that also contains youth. In the Bekaa, the share is 70%, while in the North, the share goes up to 86%. When analysing this wider age bracket up to 30 years of age, it appears that the proportion of youth among employees in the firms across all three regions is relatively high. As such, there is an opportunity to promote hiring of the 19–22 age group – including as interns so they gain work experience, particularly given the evidence of willingness on the part of both the employers and jobseekers to do so.

In terms of willingness to hire interns, it is encouraging to note that around half of the SMEs reported a willingness to hire interns, particularly in the Bekaa and the North. Only about one-third of SMEs in the Bekaa and the North, but just over half (51%) of SMEs in Mount Lebanon reported a lack of willingness to hire interns. Some interviewees did not perceive any value in hiring interns.

In the food-related sector, around 63% of firms reported such willingness, compared to 31% in firms in the construction-related sector. This is perhaps unsurprising, given the fact that construction-related sectors are more likely to include daily wage workers rather than interns. In the food-related sector, particularly in the higher-skill occupations, SMEs may be deterred from employing interns due to the cost of training incurred, especially given that interns are unlikely to remain employed by the company.

It is interesting to note that jobseekers themselves displayed a willingness to work as

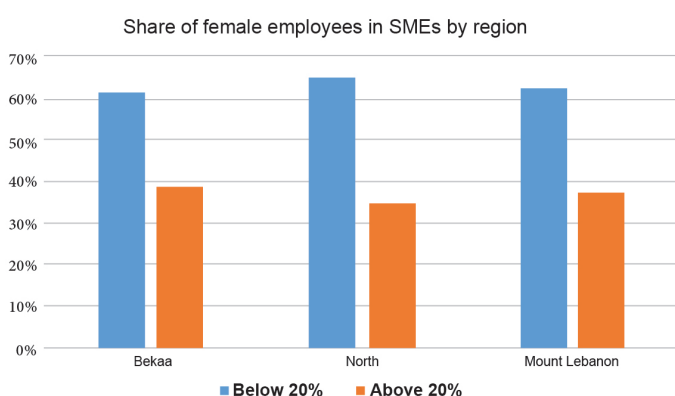
paid interns or in part-time positions in order to gain experience that would improve their job prospects in the future. From the perspective of employers, when they prefer to hire for full-time positions, this tends to be because of the need to provide training which incurs both financial costs and a time investment, which makes them less willing to train part-time staff or interns who are less likely to be retained by the company, therefore reducing the chances that the training investment will pay off. Given this preference, there is an opportunity for the Leaders Consortium members to partner with employers to support the provision of meaningful on-the-job training on an internship or part-time basis that builds the skill set of a pool of jobseekers.

HIRING PRACTICES: WOMEN

The survey revealed a low proportion of female employees in SMEs across all three regions.

The workforce of over 60% of firms in each governorate with both formal and informal employees comprised 20% or less women, with no major differences between regions or sectors. This finding appears to be primarily driven by the low share of women among total employees in the construction sector – where 76% of them employ less than 20% of women, which is to be expected given that the sector is male-dominated. In agriculture, 63% of firms have less than 20% of women among their workforce, and in food-related sectors, the proportion is 59%.

FIGURE 14: SHARE OF FEMALE EMPLOYEES IN SMEs, BY REGION



From a gender-oriented perspective, the low proportion of female employees in SMEs shows that interventions to encourage female employment could support a more gender-balanced workforce. From the employers' perspective, there was a perception that women are less likely to wish to remain employed if they get married and have children, and that they were more likely to ask for flexible or shorter working hours in order to attend to their children.

Married women generally prefer part-time jobs so they can attend to their house and families, whereas younger women are more likely to apply for full-time jobs.

It is well established that compared to men, women allocate more time to housework and importantly, five times more time to childcare activities and around half as much time in market-based work. Providing access to affordable childcare services could improve women's labour force participation, as it frees up their time for salaried or wage-based market work. The gap in childcare services is partially filled by households hiring domestic workers who provide childcare services as well. This has enabled women to remain employed, if already employed, or choose to be active in the labour market. Still, not all households can afford childcare services – whether by using nurseries or through domestic workers. In fact, it is likely that lower-income households rely on multiple sources of income and so new mothers may need to remain employed rather than become full-time carers of their children. Women tend to favour daytime jobs so that they can be at home by the time their children return from school.

As such, from the perspective of improving livelihoods for women, there is a potential to increase labour force participation and prolong employment if women are offered affordable access to childcare support. This is particularly the case among female Syrian refugees residing in Lebanon, many of whom may be unable to engage in employment to the extent that they would like but need to improve their living standards. The Leaders Consortium members

could consider providing shared community childcare services to enable female refugees to attend skills training workshops and spend more time on income-generating activities.

WORKFORCE PREPAREDNESS

The survey asked SMEs whether they had hired jobseekers who had finished secondary school, technical and vocational schools or university in the last two years. For each of these categories of jobseekers, the survey asked SMEs to indicate the employee's preparedness to fill the position they were hired for. There is an overall consensus between employers and students that more practical training is needed to increase job preparedness among graduates at various levels of educational attainment. While job preparedness does increase with the level of education, work experience and soft skills are still lacking.

In FGDs conducted with young and women jobseekers, a need was identified for improved information on vocational training, particularly through social networks. They pointed out that training programmes often lack the practical elements which could enable them to practice what they learned in theory-based courses within a training context to make them better prepared for the workplace. These could include the placement of trainees in workplaces to

gain the practical knowledge and skills to complement what they learn in theory classes.

Jobseekers highlighted that if training sessions included more practical components, they would be able to highlight this experience when employers inquired about this during the interview process. Additionally, they noted that training programmes are not tailored to different knowledge levels. Therefore, integrating practical elements within training sessions, along with some tailoring for different knowledge levels could improve preparedness among jobseekers.

Job search methodology among Lebanese jobseekers appeared scattered and it did not appear that they resorted to one specific method or platform to look for jobs. Commonly mentioned platforms included Bayt, Hire Lebanese and Ta3mal, among others. However, it was not clear to what extent these platforms were effectively matching jobseekers and employers.

FIGURE 15: PREPAREDNESS AMONG SECONDARY SCHOOL JOBSEEKERS

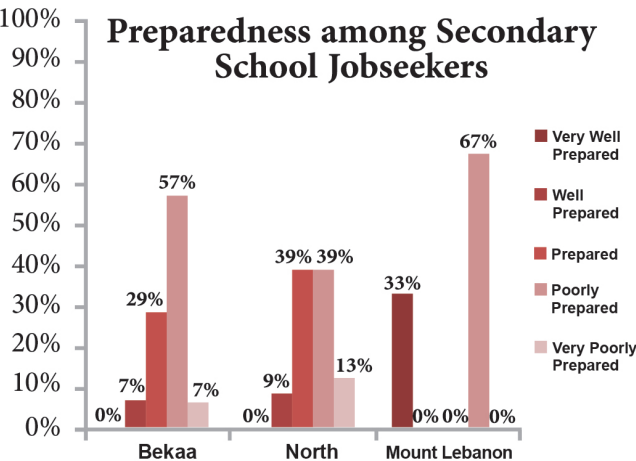
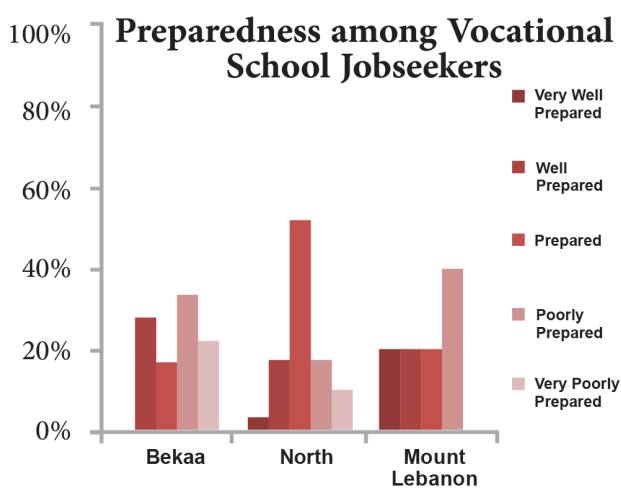
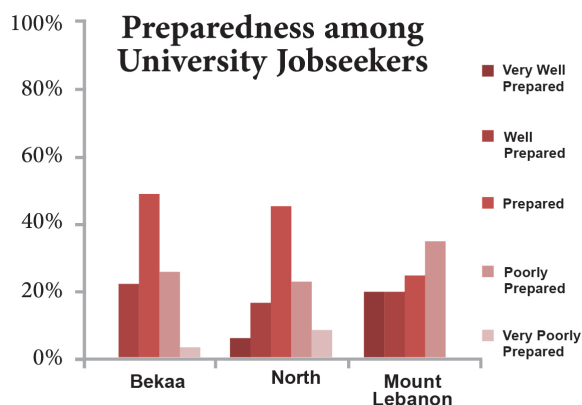


FIGURE 16: PREPAREDNESS AMONG TVET JOBSEEKERS



Additionally, geographical barriers seemed to be operating, as one of the key informants noted that jobseekers refuse jobs if they require

FIGURE 17: PREPAREDNESS AMONG UNIVERSITY JOBSEEKERS



a commute to another city. This might be due to the correlation between wages and the cost of commuting or accommodation, in addition to the social comfort that the jobseekers' local community provides. Both jobseekers and employers reported using social platforms and social networks for job searches and posting.

SKILL GAPS AND THE ROLE OF TVETS

On a general level, according to the qualitative data collection, there seems to be inadequate communication between universities, TVETs and SMEs regarding the monitoring of needs required in the market and for proper skills matching. Many vocational and technical institutes do not communicate effectively with private sector institutions, instead providing training programmes based on the availability of teachers. However, it emerged from interviews with key informants in Mount Lebanon that vocational and technical institutes have regular access to SME labour demand information, through regular monitoring of job vacancy announcements, as well as requests from SMEs for skilled labour where the need arises. Those VT institutes also update their curricula to cater for high-demand fields, as well as the fields

in which their students are most successful in finding jobs.

In other interviews with key informants in the Bekaa, respondents indicated that there are no recruitment offices in the area. Employers contact the Chamber of Commerce, post announcements in the newspaper, spread news of vacancies by word of mouth, or contact universities. The following three broad points were also raised:

- In general, employees work in fields that are not related to what they studied;
- The government-approved VT curriculum is outdated;
- Several private vocational training institutes provide on-site training within SMEs, especially in Mount Lebanon. Others provide practical training inside the classroom.

Vocational training for women, youths, Syrian jobseekers and other Syrians was reported as accessible and affordable in all regions. In the Bekaa, however, there are fewer opportunities than in the North and Mount Lebanon. Further, in the qualitative data collected, there were no clearly significant discrepancies in access to opportunities across genders, or nationalities.

Yet some schools had quotas for Lebanese and non-Lebanese nationals. It was mentioned that women tended to enroll in occupations that were more 'gender appropriate', such as programmes related to beauty care, education, interior or graphic design, and ticketing. Men, on the other hand, were enrolled in fields like IT and mechanical repair.

Box 4 provides a summary of the challenges related to TVET linkages with SMEs and the gaps in the skills provided, and presents suggestions of upskilling and partnership opportunities that could be either implemented through programmes, or advocated for at the level of public institutions.

BOX 4: UPSKILLING PARTNERSHIPS AND LINKAGES WITH SMES

The qualitative data collection, which included two KIs in Tripoli and Mount Lebanon, confirmed that there is a lack of communication between TVET institutes and SMEs. Often, training sessions tend to be based on the availability of teachers rather than the skills required in the market. Further, one of the key informants in the TVET sector noted that good vocational teachers are difficult to find, as the profession of vocational teaching is, similar to vocational training, deemed as a somewhat undesirable career option.

The degree of coordination and networking among TVET institutes, SMEs and the public sector is another important factor in the success of such training initiatives.

IMPLICATIONS AND RECOMMENDATIONS FOR THE LEADERS CONSORTIUM MEMBERS:

There are various areas which can be improved upon, some of which are simple process-related changes. Some recommendations include:

- Improving the pool of teachers of vocational training courses through the provision of a training scheme for vocational trainers to improve their instructional skills, including tailoring for different knowledge levels and learning styles, as well as ensuring that trainers are knowledgeable about the practical elements of the training being provided rather than merely the theoretical parts.
- Organizing regular TVET peer learning opportunities to improve knowledge sharing and replication of good practices. In both Tripoli and the Bekaa, it was reported to be difficult to attract good quality instructors. In Mount Lebanon, TVET instructors are professionals, and in many cases, take the lead in developing curricula based on their practical experience.
- Working with TVET institutes to update curricula to include a practical section in which students have the opportunity to practice what they learn in the theory classes.
- Update curricula to fit market needs, including updates in the field of technology, including, but not limited to, smart applications that can benefit workplaces, etc.
- Partnerships with multinational companies, such as Samsung, Mercedes, LG, and others to provide certified training schemes.
- Holding regular 'institute-sector events' with private sector leaders, including Chambers of Commerce and local enterprises, to understand their skills needs and tailor curricula accordingly. In Mount Lebanon, new TVET courses and specializations appear to be emerging based on market demand, such as mobile application development, and social media marketing.
- Adding a step in the process for TVETs when deciding on course offerings whereby TVET staff have to reference local vacancy announcements and identify clearly the linkages of their core courses with the qualifications and competencies in demand.
- Instituting a mechanism for cross-posting vacancies for teachers to widen the pool of prospective candidates – this could be done on specific platforms that could be supported by the Consortium.
- Advocacy for the certification of updated curricula at the level of the Ministry of Education and Labour.

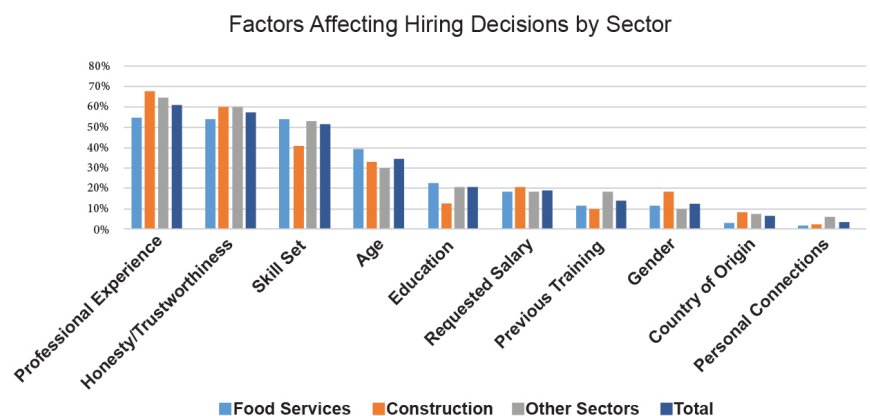
FACTORS AFFECTING HIRING DECISIONS

When hiring, SMEs reported basing their decisions primarily on the candidate's professional experience, honesty and trustworthiness, and skill sets, as shown in Figure 18 below. Age was the fourth most frequently cited factor. This is generally consistent with the skills that firms claimed were lacking among jobseekers from secondary school and vocational and technical graduates: work experience, including the necessary technical skills, as well as soft skills. From the qualitative data collection, jobseekers in the Bekaa specified that they needed support in terms of CV and interview preparation. CV writing was also mentioned by employers in Tripoli as an area of weakness among candidates. Less than 5% of SMEs said that personal connections influence their hiring decisions, although the perception among jobseekers is that connections do disproportionately affect their chances of being hired.

"We now know that experience is more important than education to employers, so we are willing to take on internships and part-time jobs so we can build some experience"

– Lebanese jobseeker

FIGURE 18: FACTORS AFFECTING HIRING DECISIONS, BY SECTOR



HUMAN RESOURCE ISSUES

Externally, the lack of skilled labour was one of the top five challenges facing enterprises, and human resource (HR) issues was the most commonly cited internal challenge, occurring in among 80% of the firms. Factors relating to HR issues included a lack of salary satisfaction, a lack of technical skills, and a lack of soft skills. This presents an opportunity to develop partnerships between firms to provide the needed training, as well as mentorship and job shadowing to nurture positive work ethics among staff.

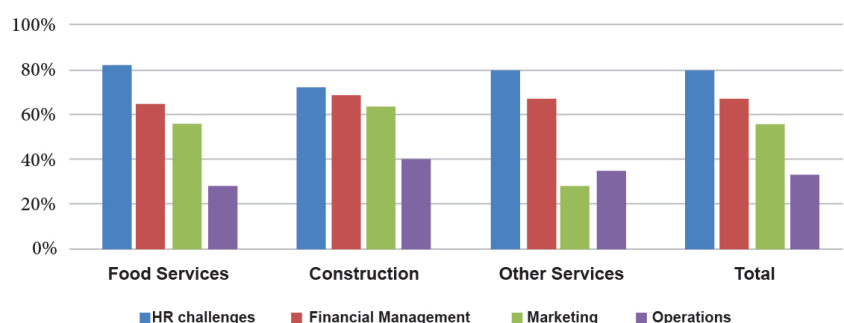
HUMAN RESOURCE CHALLENGES BY SECTOR

(Food- and construction-related sectors)

The trend of HR-related issues applies in both the food-related and construction-related sectors, as shown in Figure 20.

Through FGDs, employees indicated that both jobseekers and employees suffer from the lack of clarity regarding the stated responsibilities of jobs, with most participants noting that the tasks that are ultimately expected and asked of

FIGURE 19: SME MANAGEMENT CHALLENGES



them exceed, or differ from, those that were explained to them as part of the interview process. On this point, registered employers disagree, expressing faith in the clarity and accuracy of job descriptions advertised.

This may partially be explained as a communication breakdown between the two parties, which presents opportunities for improvement. It could also be a result of unrealistic expectations, which can also be improved upon, but would require different interventions.

When asked about the specific area of skills that were lacking among applicants, around 36% of firms noted that marketing skills were lacking. Among a quarter of the SMEs, management, finance and accounting were considered key skill gap areas.

Marketing skills include, but are not limited to, low-quality/inadequate design of products, weak advertising, weak packaging, weak usage of digital tools and/or inadequate pricing skills.

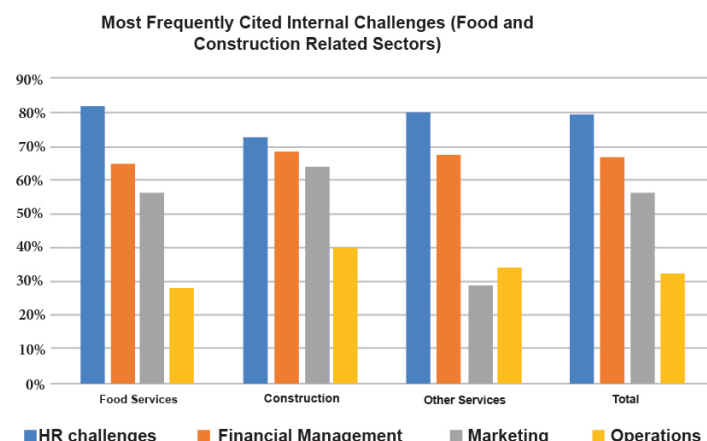
The internal human resources challenges are similar to the challenges faced when hiring.

Around half of the firms surveyed reported facing hiring difficulties, primarily related to applicants not having the required skills, experience, or right 'attitude' in terms of diligence and work ethics. Yet unfilled vacancies do not appear to significantly impact firms' growth potential, their current sales, or their ability to introduce new products or meet quality standards. Unfilled positions translated into increased workload for existing employees, without firms resorting to significant outsourcing. This limited impact could be due to the relatively few positions that remain unfilled.

PROVISION OF TRAINING BY FIRMS

Given the HR challenges and the skills gap when hiring, SMEs were asked whether they had provided business-related training to their

FIGURE 20: SME INTERNAL CHALLENGES, BY SECTOR

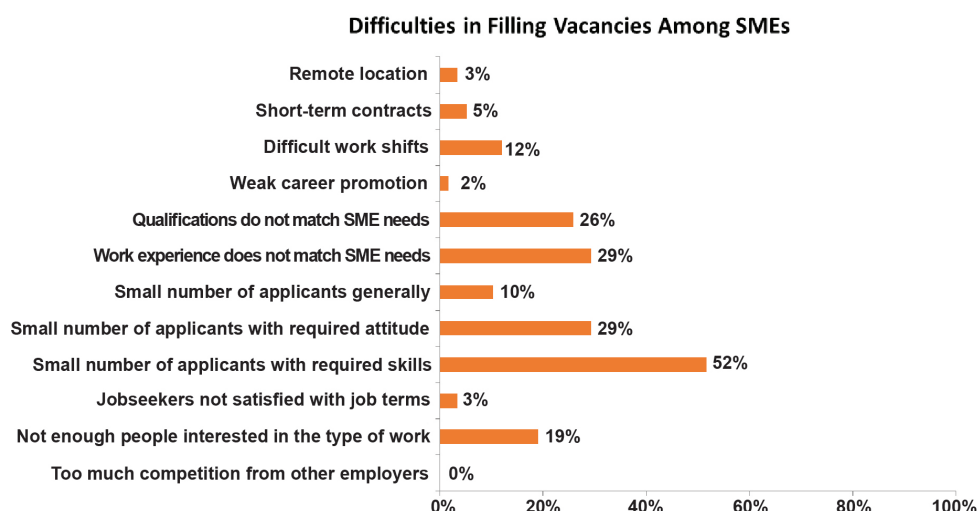
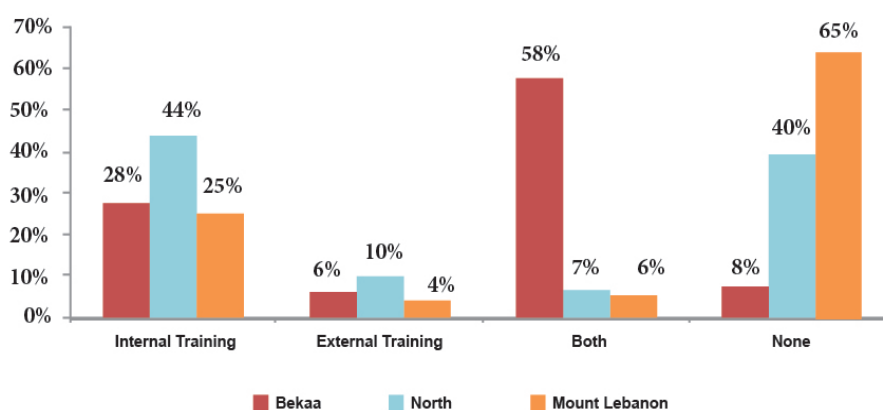


staff over the past year. The combined share reporting having provided internal, external, or a combination of both types of training was around 70%. This was consistent with the previously discussed finding that 60% of firms were planning to train existing staff in order to respond to expansion needs, enter new markets or employ new technologies. This could be in the form of very basic and informal training provision rather than structured training, which could partially explain the high proportion of SMEs offering training.

Training offered by firms, however, varies considerably across regions. In the Bekaa, over 90% of firms reported providing either internal or external training or both (the dark red columns in the chart). In the North, around half of firms provided training, whereas, only one-third of firms in Mount Lebanon reported providing either type of training.

"I cannot afford to spend time and money training existing staff; I would rather do it myself or hire someone who can do the job"

– Owner of a food-packaging factory in Bekaa

FIGURE 21: DIFFICULTY IN FILLING VACANCIES AMONG SMES**FIGURE 22: SME TRAINING PROVISION, BY REGION**

The survey inquired about the challenges that firms faced in training their employees and the main reasons behind a lack of training on offer. As shown in Figure 23 below, the absence of a culture of capacity building was the main challenge faced in training employees or given as the reason for the absence of training. This was especially the case in Mount Lebanon compared to the two other regions. In construction-related sectors, the proportion of firms that identified the absence of a capacity-building culture was around 50%, compared to 34% in food-related sectors.

Around 25–30% of firms in the Bekaa and the North indicated that they faced the challenge of having no or poor information on courses and trainers, as well as a lack of available courses

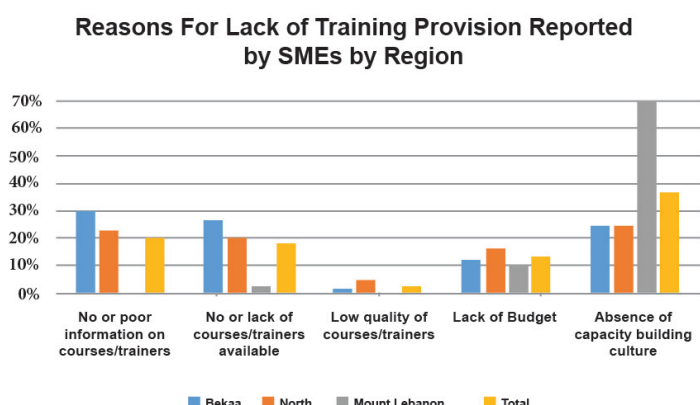
or trainers. When combined with the absence of a capacity-building culture, this reinforces the need for market-relevant training that is well advertised so that SMEs are aware of available training schemes. Co-designing curricula with input from SMEs in the ecosystem can simultaneously support the creation of market-relevant training schemes as well as nurturing, albeit slowly, a capacity-building culture.

Finally, 10–15% of the SMEs responded that a lack of funds is a challenge for the provision of training. As such, potentially offsetting the costs of well-designed market-relevant training could improve the employability and readiness of jobseekers.

Within the context of expansion plans, SMEs were asked about how they intend to fulfill new

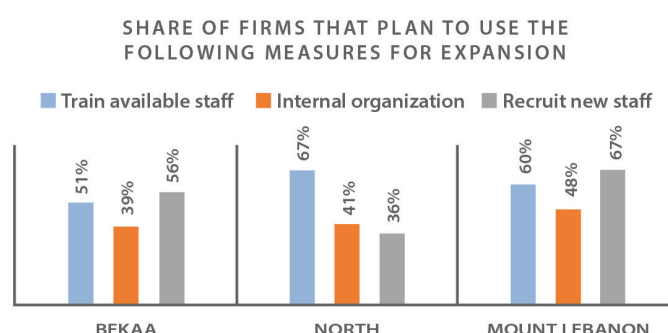
tasks emerging from their expansion/change in operations, with the assumption being that such expansion/operational change would require a different skill set among the workforce. The responses were encouraging, as 60% of the surveyed firms in all regions indicated that they plan to train available staff. Around 53% of the firms indicated that they planned to recruit new staff during the time the survey was conducted.

FIGURE 23: REASONS FOR LACK OF TRAINING PROVISION REPORTED BY SMES, BY REGION



This approach was particularly prevalent in Mount Lebanon, with 67% of firms indicating plans to recruit new staff to conduct emerging tasks relating to expansion or operational change. Less than half the firms in all regions planned to reorganize staff and competencies internally, which to a certain extent further supports the claim that a skills gap exists.

FIGURE 24: MEASURES BY SMES TO MEET EXPANSION

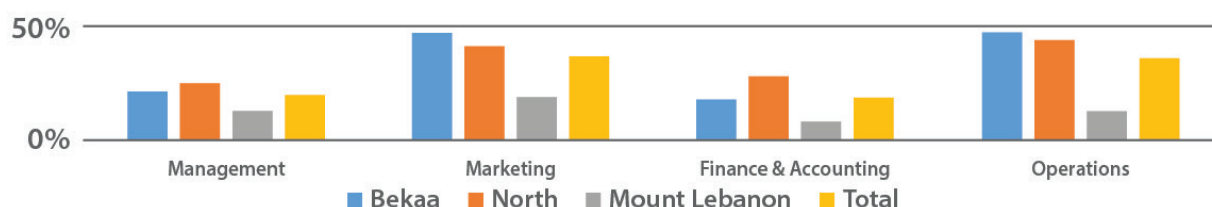


TRAINING TOPICS MOST IN DEMAND

Across all areas and all sectors, including the food- and construction-related sectors, the training topics most in demand by firms were marketing and operations. This was consistent with one area of the perceived hiring skills gap (marketing), although operations was an area least cited as a skill that was lacking in

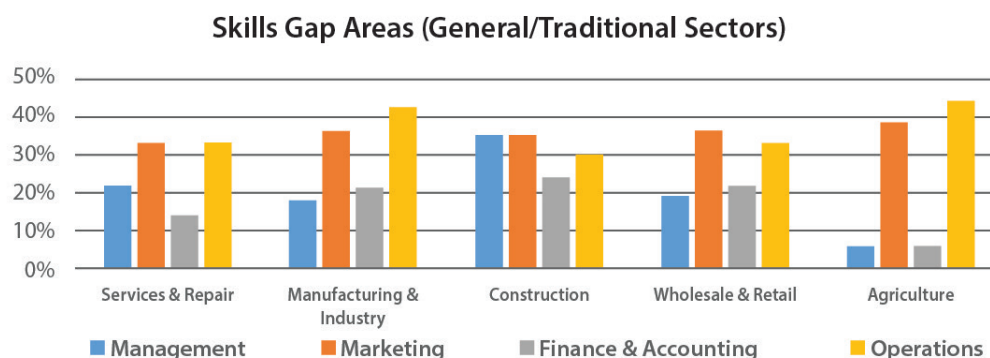
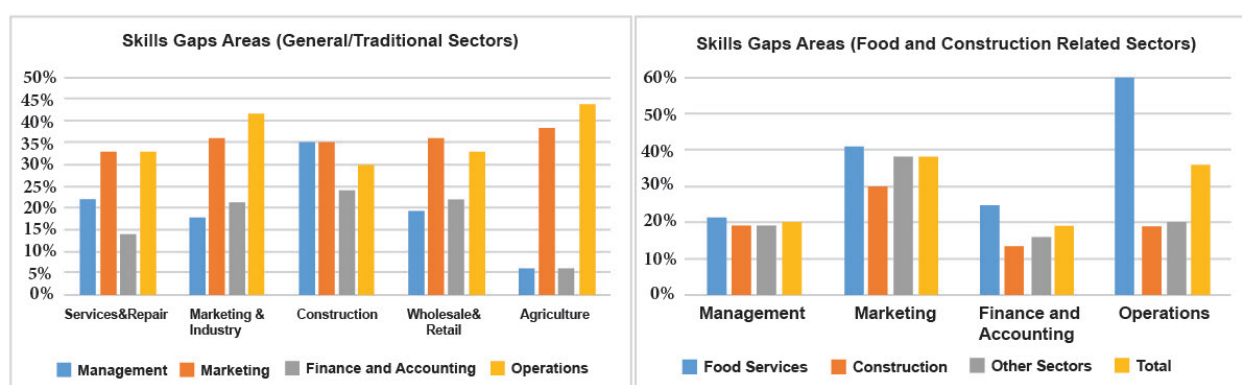
job applicants when hiring. In Mount Lebanon, training needs were more balanced across topics. Discussions with employers confirmed that the core training needs are in marketing and operations (e.g., in the food sector, alternative agricultural methods and cooking, training in specialized machinery).

FIGURE 25: SKILL GAP AREAS, BY REGION



All firms, not limited to those currently hiring, were asked to highlight the specific skills needed within the broad training categories (management, marketing, finance and accounting, operation, other). Figure 25 above

shows skills gap areas by region, whilst figures 26 and 27 below show the skills gaps according to the general/traditional sectors as well as food- and construction-related sectors.

FIGURE 26: SKILL GAP AREAS, BY SECTOR**FIGURE 27: SKILL GAP AREA, BY SECTOR (TRADITIONAL AND FOOD-/CONSTRUCTION-RELATED)**

Again, due to the low number of responses, we treat these responses as qualitative. In terms of management, firms highlighted the need for general management skills, HR management (noting employee motivation), as well as client communication and relations, and work ethics.

Within marketing, the vast majority of responses indicated the need for advertising skills, both traditional and new methods leveraging social media networks, and ecommerce. This might also indicate that there is a need for additional advertising and marketing services for SMEs, which could be a potential job market.

Within finance and accounting, firms noted accounting, budget management, and financial reporting as skills that were generally lacking.

Skills training in financial reporting and budget management (including forecasting) may improve overall SME planning. From the previous

section, relatively few firms based their revenue growth expectations on past trends – this could be due to a lack of such skills among their staff, as well as a lack of structured planning processes.

Under operations, firms highlighted gaps in skills regarding the use of specialized equipment and sector-specific production processes.

This includes skills gaps in introducing new products, new packaging technologies, and new equipment in dairy production.

Box 5 below analyses the skills gaps in food-related sectors, which are relevant and applicable for all three regions of the study, and highlights implications for the Leaders Consortium members. Food-related subsectors include food services, food manufacturing, food-related agriculture, and food wholesale and retail.

BOX 5: SKILLS GAPS IN FOOD-RELATED SECTORS

APPLICABLE REGIONS: TRIPOLI, BEKAA AND MOUNT LEBANON

Our qualitative data collection highlighted that participants, including employer in food-related sectors, deemed that the training being provided by schools and vocational institutes today is neither up to date nor compatible with market needs. It was noted that there should be more focus on aesthetic food decoration, 3D work on cakes and pastries in several governorates rather than just the capital Beirut, and the introduction of new types of cuisines in rural areas. This would provide exposure to, and connection with, other types of food and cultures, and potentially expand customer demand. It was highlighted that waiters need to learn more about customer relations, on-job manners, personal communications, food safety and hygiene among chefs and restaurant owners.

Key informants and focus groups highlighted that the agro-food sector has potential for growth provided it is supported with new methods, specialized machinery and technologies to improve productivity, competitiveness and possibly labour absorption capacity. With trade routes severely compromised since the crisis in Syria, this has put further strain and increased cost on agro-food exports. Importantly, market access was highlighted as a key constraint.

While unrelated directly to training, providing support in terms of aiding small-scale agro-food producers in accessing local markets, including offsetting or fully funding transportation of goods to markets, which acts as a cost constraint, could improve their employability.

Training in food safety/quality control and product marketing was noted as one possible way to fill the skills gap.

Implications and Recommendations for the Leaders Consortium Members

- Food safety: Provide training in food safety, which was repeatedly mentioned as a key skills gaps requiring support. This could be through collaboration with providers of food safety and hygiene trainings, including TVET institutes, possibly offering internationally recognized certifications.
- Operations: Provide training in operating specialized machinery in the food-packaging sector and identify local partners already providing new cuisine training and try to leverage their efforts to fill gaps.
- Customer relations: Support the provision of customer relations training focused on restaurants and the hospitality sector. This could be done in partnership with local restaurants and hotels in the areas, possibly in partnership with the Ministry of Tourism.
- Product marketing: Provide training in food products marketing, the need for which was highlighted in both the qualitative data as well the quantitative open ended-questions.
- Incentives and training: Collaborate with restaurants and hotels on an incentive scheme whereby top-performing staff could receive grants to receive training in new cuisine, customer relations management, and other needed skills.

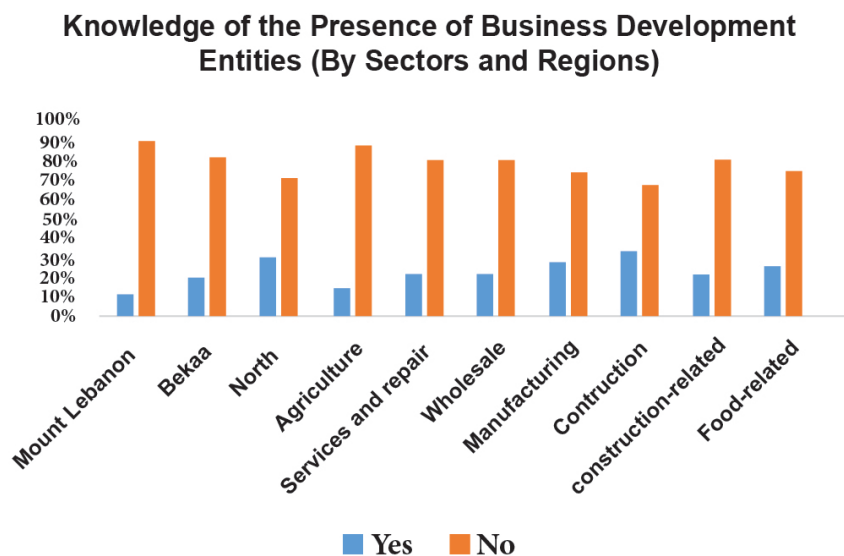
5 BUSINESS SUPPORT SERVICES

Despite existing skills gaps, there is an overall lack of knowledge and use of business development entities among SMEs.

KNOWLEDGE OF BUSINESS DEVELOPMENT SERVICES

As Figure 28 below shows, over 80% of SMEs in Mount Lebanon and the Bekaa as well as around 70% of those in the North reported that they do not know of business development entities in their area. Analysing sectorally, around 80% of firms in each of the agriculture, services and repair and wholesale and retail sectors reported having no knowledge of such entities, which was similar to SMEs in the food-related and construction-related sectors.

FIGURE 28: KNOWLEDGE OF THE PRESENCE OF BUSINESS DEVELOPMENT ENTITIES, BY SECTOR AND REGION



To gain a better understanding of the existing usage of BDS services, we asked firms that confirmed a knowledge of BDS entities, whether they have previously used BDS and to specify which services they used. The most frequently cited services to be used were financial consulting and accounting services. The firms that did not use BDS services cited a lack of need or interest.

Among focus group participants, the majority mentioned the Intaj project by Mercy Corps and the Chambers of Commerce as providing business support services. This result can be attributed to the fact that most of the focus group participants were either approached by Mercy Corps or had heard about it from others

within the sector. In Mount Lebanon, businesses seemed more resistant to the notion of BDS's enquiries, indicating that they did not need training, showing a gap between perceived needs and reality, given the education and business knowledge these employers have. In the Bekaa and Tripoli, firms recounted some success stories, some of which were partially due to INGO interventions, and as such were more open to the idea of BDS support. These firms noted successful BDS interventions like paid internship programmes through which these firms received interns who supported the firms in certain tasks, others mentioned INGO support through the provision of certain software, equipment and machinery that helped them advance their work.

TABLE 10: USAGE OF SERVICES OF BDS ENTITIES BY SECTOR

Sector	Yes, Service provided	Reasons if not
Services & Repair	Financial consulting (1) Financial support (2) غرفة الصناعة والتجارة (1) Arcenciel (1) British company	No need (3) Not interested (1) Satisfied (1) No need for external training, they do their own training (1) They will ask for partnership (1) Low budget (1)
Wholesale & Retail	Accounting services (2) Consulting (3) Financial consulting (1) Financial support (2) IRI (1) Chamber of Commerce and Industry (1)	Absence of governmental entities who support (1) No need (3) Low budget (2) Satisfied (10) They will ask for partnership (1) No need for external training, they do their own training (1)
Manufacturing & Industry	Accounting services (1) Arcenciel (1) Boecker (1) Financial consulting (1) Financial support (2) IRI (2) Training (1) Arcenciel (1)	Absence of entities (1) No need (2) Satisfied (5) No need for external training, they do their own training (1)
Construction	Accounting services (1) Consulting (3) Financial support (1)	No need (1) Not interested (1)
Agriculture	Arcenciel (1)	No need (2) Satisfied (1)

Note: Numbers within parentheses indicate the number of responses.

BDS SUPPORT NEEDED

The survey asked SMEs to provide information on the entities that could help the business develop.

The responses were limited, but included banks and financial institutions, chambers of commerce, and ministries. Some highlighted that advertising support was needed. There was no mention of other entities, though it might be instructive to explore the impact of family support and remittance by family members working abroad in future studies. It is important to note that such services are provided to a certain extent in big cities like Zahle and Tripoli; most recently, however, with the presence of INGOs, the focus on economic development, and the interest in boosting business, such services are growing to reach different urban and rural areas as well.

TABLE 11: ENTITIES THAT COULD SUPPORT YOUR BUSINESS (Q68) – RESPONSES TO OPEN-ENDED QUESTIONS IN THE SURVEY

Sector	Name of Entities	Sector	Name of Entities
Services & Repair	Ministry of Tourism (2)	Construction	Fransabank (2)
	NGO (1)		Financial support
	BLOM bank (1)		AUB (1)
	Arab Bank (1)		Boecker (1)
	Chamber of Commerce (1)		Advertisement (1)
	Advertisement (1)		Arab Bank (1)
	Kafalat (1)		Boecker (1)
	Byblos bank (1)		Chamber of Commerce (1)
	Legal matters (1)		Order of Engineers (1)
	Ministry of Environment (1)	Agriculture	Ministry of Agriculture (1)
	Ministry of Industry (1)		Chamber of Commerce (1)
			Order of Engineers (1)
Wholesale & Retail	Advertisement (3)		
	BLOM bank (1)		
	Financial support (7)		
	Fransabank (2)		
	Kafalat (1)		
	Safe Stability (1)		
	SAP IT (1)		
	Technology (2)		
	Training (2)		
	Chamber of Commerce (1)		
Manufacturing & Industry	Byblos bank (1)		
	Arab Bank (1)		
	Chamber of Commerce (4)		
	Advertisement (2)		
	BLOM bank (2)		
	Boecker (2)		
	Arcenciel (2)		
	Financial support (3)		
	Ministry of Industry (2)		
	Ministry of Power (1)		
	Research Institute (1)		
	Safe Stability (1)		
	Byblos bank (1)		
	Fanar Laboratories (1)		

ADVERTISING AND MARKETING SUPPORT

It is important to highlight that among the services mentioned during the focus groups and interviews with employers, advertising and marketing services were recognized as the most needed. This indicates the need to open access to new markets and attract a new client base.

The skills in need of development are elaborated upon in the recommendations section. The types of services could become another subsector for job creation, including:

- Marketing strategies and market studies;
- Advertising and branding;
- Social media strategy and platform management;
- Website development and e-commerce techniques;
- Customer relationship management.

6 IMPLICATIONS AND RECOMMENDATIONS FOR THE LEADERS CONSORTIUM MEMBERS

A COMPREHENSIVE APPROACH TO VOCATIONAL TRAINING REFORM

Though the most recently published economic indicators project a rather sombre economic forecast, this study traces relatively optimistic openings, and concludes a comprehensive approach to job creation through steps to fill the gaps in skills provision to match labour demand. This optimism can be deduced through the SME survey results, which show that more than half of the surveyed SMEs are expecting growth in the coming year. The reasons for this optimism were reported by employers based on their expectation of a relative improvement in political stability, their willingness to develop work strategies, and their plans for future expansion.

However, optimistic perceptions, expectations of revenue growth and plans for expansion alone are not a direct sign of an increase in the labour absorption capacity of SMEs.

Therefore, equipping jobseekers from a vulnerable background with skills related to 'growing' sectors is not enough to ensure their employability or to guarantee job creation in different market sectors. The study results emerged not only from employers, employees and jobseekers, but also from various stakeholders with first-hand experience in the labour market, the vocational training field and government representatives. They showed that, even though there is a need to fill important gaps in skills in the labour market, there are several components to be considered prior to the provision of those missing skills, in order to ensure efficiency in vocational training, and to achieve an increase in employability and sustainable impact within different communities.

The recommendations below suggest a more comprehensive approach to filling the skills gap in the marketplace, and are based on the

experiences of stakeholders in the public, private and non-governmental sectors.

TRACING AND INDUCING LABOUR ABSORPTION CAPACITY

Identifying and supporting the sectors that are capable of absorbing additional labour, thereby creating new jobs rather than replacing old ones when recruiting newly trained individuals, are key prerequisites for employability through vocational training. The lack of data on SMEs and the labour market is a key barrier to effective monitoring of the labour absorption capacity.

One core recommendation is to develop an accessible database of SMEs and the labour market.

This study tackles the issue through the triangulation of the previous experience of INGOs, TVET organizations and private sector companies. Potential sectors and subsectors are listed in the research findings, and the skills needed within each are listed in the recommendations section under the heading Skills Gaps by Sector. Additionally, this section provides a sector-specific analysis of how the subsectors need to be supported prior to skill provision. The support mechanisms include, but are not limited to, capital investment to boost SME growth and creation of new SMEs (especially in niche sectors), provision of business support services to improve SME product visibility and to boost customer demand, etc.

IDENTIFYING THE RIGHT BENEFICIARIES

Reaching out to the right beneficiaries for vocational training is critical and key for

increasing the chances of success regarding employability goals. It is therefore important that this approach takes into consideration not only the vulnerability of individuals and their need for an increased income, but also their background, social and cultural upbringing and values that might impact their choice of working in one place and not the other, and their ability to bring added value within the sector that they will be trained to join. Outreach tools should therefore take into consideration the hiring practices of each subsector and build competency to improve their labour absorption capacity.

It would also be helpful to design and provide a series of orientation sessions and close individual supervision to ensure the convenience and suitability of the training to the beneficiaries. This kind of attention requires an investment of time, but significantly enhances the success rates for eventual employability.

ENSURING EFFICIENCY AND SUSTAINABILITY OF KNOWLEDGE ACQUISITION

Skills development through vocational training can be sustained and made more efficient by reassessing how best to systematically apply the skills through internships and on-the-job training. However, sustainability is not only achieved by direct and prompt employability, but also through processes that equip trainees with the capacity and official eligibility to continue their learning path in accredited institutions.

This is ensured through partnership with the Ministry of Education and Higher Education, by adapting short-term vocational training to the system of medium- to long-term certified programmes and university programmes.

Another concern is the quality and duration of the training provided, as well as certain practices that were reported as some of the lessons learned, such as the issue of paying young people to receive training, which contradicts the value of acquiring knowledge.

Those practices are elaborated in Box 4, in Section 4 of this report.

INFLUENCING PERCEPTIONS

Despite the fact that certain sectors were identified as having the potential to absorb labour, there is a tendency, especially among youth, to reject certain jobs and perceive them as less interesting and unattractive. This is most common in jobs that require physical effort, or rather that do not suit the stereotypical image of higher social status and high-skilled jobs (i.e., engineer, manager, etc., rather than technician, carpenter, etc.). There is therefore a need to use tools of social influence to highlight hidden and long ignored opportunities. Suggested ways to achieve this are campaigning through social media, providing positive success models and well-designed orientation sessions, etc.

CREATING THE RIGHT PARTNERSHIPS

As has already been discussed regarding potential partnerships among TVETs, SMEs, public/para-public institutions, etc., partnerships are important in order to ensure sustainable impact, and to allow the different entities to develop efficient coordination mechanisms to match supply and demand. This kind of participation should involve partners such as the regional chambers of commerce, syndicates, cooperatives, MSMEs, Ministry committees, etc.

Partnerships between SMEs and institutions that provide vocational training are another way of ensuring sustainability and efficiency in the transfer of knowledge. One successful model is the case of IECD facilitating an agreement between Mitsulift and CNAM whereby the latter adapted its educational curriculum to provide adapted skills for students to serve the purposes and needs of Mitsulift, while the latter provided in-kind support to the institute such as elevators and technical assistance.

The following section highlights the main implications and recommendations for the Leaders Consortium members based on the skills gap analysis conducted. Recommended skills to be developed to improve the alignment of labour supply to demand are technical skills by sector, soft skills, and business development skills, in addition to recommendations related to the inclusion of Syrian refugees, and the policy environment.

SKILLS GAPS BY SECTOR

The findings of the study point out the technical skills required by SMEs in various sectors. This section breaks down the required technical skills, as revealed through the qualitative and quantitative analyses. Below is a list of job opportunities within potential sectors, technical skills for each job, and a suggested approach for Consortium Partners to design curricula to better fill the gap and respond to market needs.

POTENTIAL OPPORTUNITIES AND POTENTIAL SECTORS

SMEs reported low workforce preparedness and that there is a gap in technical skills, which the Consortium Partners can fill through adapted vocational training programmes. Based on the quantitative data collected, seven primary promising sectors reveal the need for jobs and labour skills development. The sectors selected

through the quantitative data are inclusive of the sectors selected by the Consortium members. These skills could be developed by the design of new tailored vocational training curriculum and improved access for those interested and for employees within SMEs, or through adaption of and support for existing programmes. Table 12 summarizes the promising sectors by geographical area, the different jobs required, and the technical skills needed. It also depicts the training topics provided by one of the partner organizations in the Consortium, Makhzoumi Foundation, based on the programmes provided to the researchers and in the light of the specified sectors. The table also elaborates on a few sector-related factors that are required to ensure a more comprehensive approach to skills development. Note that the below recommendations follow the findings and specifications listed and elaborated in Table 6, as well as Boxes 1, 2, 3 and 5.

Promising Sector + Targeted Area/s	Jobs with Skills Gaps	Technical Skills Needed and Provided	Complementary Measures
Cultural Tourism Targeted Areas: Tripoli, Bekaa	City Tour Guides organizing quality walking experiences for foreign tourists in sites and the city around it. Both in Bekaa and Tripoli.	Skills needed: <ul style="list-style-type: none"> - Historical and archaeological knowledge - Languages: English and French primarily - Communication skills and customer relations - Events management - Children's entertainment Skills provided by partner institution: <ul style="list-style-type: none"> - Photography, video 	- Supporting coastal tourism as a sector: This can help extend an existing niche sector along the shore of North Lebanon. Organized trips to the islands off the shore of Tripoli would not only allow for more jobs for those running boat tours, but also the city as a whole, as more people visit.
	Boat Tour Operators sharing stories, providing good quality food and entertainment activities for foreign tourists. Specific to Tripoli.	Skills needed: <ul style="list-style-type: none"> - Boat mechanics and maintenance (specific for Tripoli) - Wood treatment for durability in water - Historical stories related to Tripoli and the islands - Food services on the boat - Communication skills and customer relations Skills provided by partner institution: <ul style="list-style-type: none"> - Photography, video 	- Supporting fishermen to extend their scope of work to accommodate for additional coastal activities and partnering with aquatic sports groups to organize events. Bringing them together with these sports groups and boat tour operators will enable them to provide a full package of services for tourists and visitors.
Crafts Targeted Area: Tripoli	Craftsmen glass making, soap making, oil pressing, furniture/textile design and manufacturing to supply the local market and foreign tourists.	Skills needed: <ul style="list-style-type: none"> - Technical crafts workshops for professionals - New machinery operation (on job training on latest technological techniques) - Professional and innovative product design - Marketing craft products - Sales and customer relations Skills provided by partner institution: <ul style="list-style-type: none"> - Basket and box decoration - Candle moulding and decoration - Loom weaving - Paper art - Faux bijoux - Drawing on tissue and mirrored glass - Sewing - Soap making - Flower arranging 	<ul style="list-style-type: none"> - There should be an extensive focus on business development skills to ensure innovation and proper marketing alongside technical skills. This will allow trainees to integrate into innovative sectors and to the eventual creation of local niches. Failing to complement technical training with the corresponding components might lead to saturation in the skills provided and a risk of decreased employability opportunities due to limited market demand. - Especially within the sectors that face import competition, such as textiles, furniture, carpentry, etc., it is important to provide innovative techniques, up-to-date design methods, and the required machinery. For instance, most carpenters in Tripoli are not able to compete in the market because they are still producing old-fashioned items and are incapable of matching innovative, imported products.

<p>Nursing Targeted Area: Tripoli, Bekaa and Mount Lebanon</p>	<p>Male and Female Nurses to supply hospitals, medical institutions and primary healthcare centres.</p>	<p>Skills needed</p> <ul style="list-style-type: none"> - Nursing skills as per the government-approved curriculum - Extensive first-aid training - Patient daily care skills - Hospital hygiene protocols - Basic psychological support for patients <p>Skills provided by partner institution: None</p>	<ul style="list-style-type: none"> - In nursing, it is important to investigate ways of integrating short-term training into a potential preparation for higher levels of education (i.e., from nurse assistant, to medium-term and long-term nursing certificates, to university-level diplomas). This can be worked through a partnership with the MEHE. - It is important to involve a set of hospitals and dispensaries from every region in the adaptation of short-term curriculum to make sure that the skills provided match the skills that are needed.
<p>Jewellery Production and Sales Targeted Areas: Tripoli and Mount Lebanon</p>	<p>Jewellery Machines Operators to use and maintain new technology and machines in jewellery production.</p>	<p>Skills needed:</p> <ul style="list-style-type: none"> - Jewellery design - Diverse gold casting techniques - Diverse gold polishing techniques - Jewellery fabrication techniques - Stone setting techniques - New machinery operation - Marketing and sales of jewellery products <p>Skills provided by partner institution:</p> <ul style="list-style-type: none"> - Jewellery repair and design 	<ul style="list-style-type: none"> - It is important to investigate the potential of an internal partnership among jewellery producers and the syndicate in order to study the potential of sharing machinery and producing collectively at a lower cost (under the supervision of the syndicate), in order to be able to export to new markets (increased demand), and pay higher rates to workers in the field. - There is a need to encourage the youth and improve their perception of skills related to the jewellery-making field.
<p>Food Sector Targeted Areas: Tripoli, Bekaa and Mount Lebanon</p>	<p>Chefs and Sous-Chefs in new cuisines for hotels and restaurants attracting local and foreign customers. Marketing and Sales of food products for local production of food products as well as for the restaurants business. Waiters</p>	<p>Skills needed:</p> <ul style="list-style-type: none"> - Cooking techniques - New cuisine training and healthy cooking - Kitchen assistants - Food processing - Food safety, health, and hygiene - Marketing and sale of food products - Customer relations - Quality control <p>Skills provided by partner institution:</p> <ul style="list-style-type: none"> - Chocolate moulding and decoration - Cake decoration - Sugared kernels - Pastries - Macarons - Cookies - Marzipan making 	<ul style="list-style-type: none"> - There is a need to support artisanal food production and provide workers with parallel and continued support in setting and implementing specific marketing strategies. - In the food sector, quality control at the level of production, service, conservation and transportation of raw material, and many other areas is needed. Providing skills related to quality control for existing workers in the field will reduce labour turnover rates, increase the quality of production and services, and eventually create new demand and jobs.

<p>Agriculture Targeted Area: Bekaa</p>	<p>Farmers capable of using alternative agricultural methods efficiently and sustainably.</p>	<p>Skills needed:</p> <ul style="list-style-type: none"> - Agro-ecosystem analysis - Non-chemical alternatives - Organic food production - Pest management - Composting - Soil amendments and nutrient management - Soil quality and testing - Water-saving irrigation techniques - Quality control - Preservation techniques (to increase shelf duration) <p>Skills provided by partner institution: None</p>	<p>- The agricultural sector is directly linked to agro-food industries. Revising the role of government policies in protecting local produce and encouraging the use of internal agricultural production for local industries is important.</p>
<p>Construction Targeted Areas: Tripoli, Bekaa and Mount Lebanon</p>	<p>General Maintenance Workers to provide services during and after the construction work is complete</p> <p>Decorators to provide painting and wallpaper services, and implement practical decorative tasks related to carpets, carpentry and furnishings</p>	<p>Skills needed:</p> <ul style="list-style-type: none"> - Fire prevention - Water networks - Electrical wiring and applications - Air conditioning and heating systems - Plumbing maintenance - Carpentry and mechanical components - Machinery and equipment maintenance <p>Skills provided by partner institution: None</p>	<p>- Working on youth perceptions towards construction-related jobs and encouraging them to proceed with related training and jobs.</p> <p>- Ensuring knowledge sharing in the workplace (case-by-case follow up with trainees to make sure they are learning the full processes rather than dispersed tasks under instructions).</p>

According to KIs and FGDs, the beauty care sector was one of several that was oversaturated.

Firstly, several short-term training programmes are tackling this topic and providing skills with very low employability rates. Secondly, there has been several failed attempts to assign trainees to existing beauty-care centres for training as a result of cultural differences (Syrian/Lebanese), and because the market is saturated. It is therefore not recommended to proceed with this kind of training in any of the three regions. Also, there is a common trend for beauty-care centres to provide internal on-the-job training for their employees; this, along with the credible medium- to long-term training institutes, should be sufficient to provide for and serve the market for beauty-care skills.

Additionally, computer maintenance, networking and programming as well as design and media (AutoCAD, Adobe, 3D Max) skills were found to be lacking in the study; however, given input from

employers and SMEs, there is a need to support their online presence in terms of website development and e-commerce to keep up with today's market. Given that this is a service subsector and could have some potential routes, it is important to explore further the appetite for such education. Mobile phone repair, on the other hand, appeared to exhibit potential, in Tripoli particularly, due to the existing oligopoly in phone repair services alongside a simultaneous lack of quality service. This is a sign that providing high-quality skills training for mobile repair in Tripoli will create a potential for breaking the oligopoly with competitive, quality services. As for development programmes for teachers (ICT, English, Teaching Methodologies), the study results suggest the need for such skills, especially when related to childcare, as

well as vocational training for teachers.

SUGGESTED IMPLEMENTATION MECHANISMS

The Leaders Consortium members, with DRC and Maksoumi Foundation in charge of the development of the VT job-matching apprenticeship, could partner with local organizations, other TVET institutes (public or private) and employers to co-develop curricula and organize training that would effectively equip trainees with the necessary technical skills.

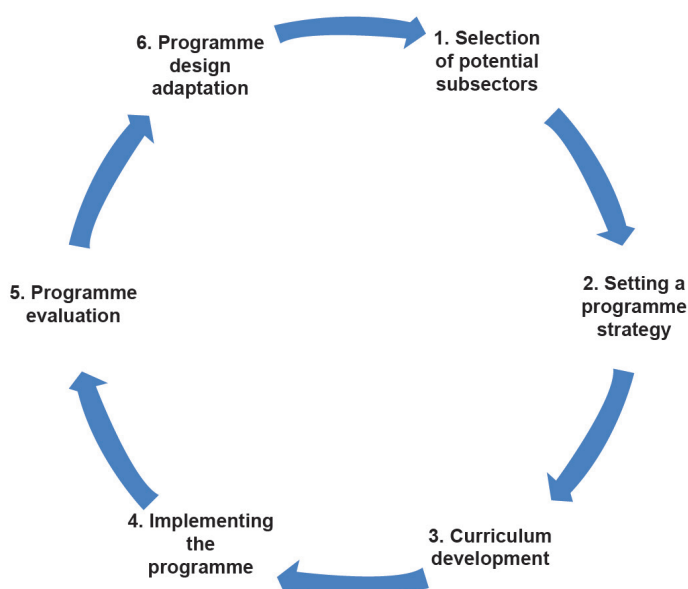
Below is a suggested approach to design, develop and deliver tailored and adapted technical skills training.

1. Selection of potential subsectors and topics: The Leaders Consortium members will start by examining their existing programmes, selecting the potential subsectors within the main sectors, and define the training topics based on the technical skills identified by the study and the resources available through their partner.

2. Setting a programme strategy: Each training programme should have a strategy that defines the target audience through criteria such as seniority level, age, expertise and education, in addition to targeting them through existing SMEs or other indirect channels such as universities and NGOs. The strategy should include a combination of theoretical and practical sessions, in the classroom and on-site, internships and placement services.

At another level, programmes should take into consideration government approved programmes and procedures to enable the Consortium's programmes to receive official recognition if necessary.

Finally, an important aspect is the cost recovery of such training programmes, since, in many cases, neither SMEs nor individual participants can afford to pay the fees; alternatives could be a partnership with other private sector businesses, making use of the workplace for practical sessions, coordinating with other training institutes, and ensuring funding from donor agencies.



3. Curriculum development: In order to set a syllabus for every curriculum, the support of experts as well as the involvement of a set of SMEs in each of the selected subsectors is required. Those experts will join the curriculum development committee and provide their input from the practitioner's point of view, including information on the most recent and innovative techniques. The experts' support guarantees market knowledge transfer in designing the curriculum. The experts should preferably have knowledge of teaching and learning techniques, and/or previous experience in vocational training. In addition, the group of SME representatives will support in the adaptation of the curriculum to take into account local needs and barriers. For every training programme, the curriculum development committee should ensure the following:

- Clear learning outcomes: The course should include technical skills development as well as some basic knowledge around the subject matter.
- Comprehensive set of modules: There should be a logical sequence of modules that ensure an accumulation of skills through the learning process, which responds to the original learning outcomes.
- Experiential learning methods: A learning-by-doing approach should be adopted through a set of methods that ensures skill building rather than just cognitive development.

4. Implementing the programme: This consists of the delivery of the training programme, as well as the implementation of the additional components of the programme as per the strategy developed.

5. Programme evaluation: After every round of training implementation, it would be useful to evaluate the programme on two main levels:

- Training Evaluation: Trainees' feedback on the curriculum in terms of learning outcomes, skills developed and methods used could further

inform the improvement of the programme.

- Programme Impact: An evaluation process should follow the implementation of the programme by reaching out to the SMEs hosting trainees as interns in order to assess the impact of the programme based on their performance.

Programme design adaptation: Adapting the training programme design according to the evaluation results is a fundamental means to ensure its improvement and relevance to cope with the volatility of the economic situation and the rapid changes happening in the marketplace.

This process should be continuous, in order to guarantee sustained adaptation to the marketplace.

BUSINESS SKILLS

In addition to the technical skills required, the study shows that there is a significant gap in business skills required for SMEs to adapt to the marketplace. Deficiencies in client communication and general managerial skills and work ethics were identified in this respect.

Marketing skills also require development, particularly sales skills, packaging skills and advertising skills. Furthermore, accounting, budget management, and financial reporting were recognized as skills that were lacking in terms of financial management. Production processes, quality management and technical knowledge were among the skills that were noted as lacking under operations. It is worth noting that work ethics also appeared as a lacking skill under operations, which could indicate a gap in expectations between employees and employers regarding working hours and diligence.

Table 13 breaks down the business skills that are required by the job market and which can be adopted within new training programmes:

TABLE 13: BUSINESS SKILLS REQUIRED BY JOB MARKET

Main skills gap area	Specific skills training needed
Management	<ul style="list-style-type: none"> - General management - Human resource management - Interpersonal relationships - Administration - Problem-solving - Conceptual and analytical thinking - Fostering innovation
Financial Management	<ul style="list-style-type: none"> - Bookkeeping and accounting principles and techniques - Cash flow management - Tax planning and reporting - Budget management - Financial management and reporting
Marketing	<ul style="list-style-type: none"> - Marketing strategy - Market mapping and analysis - Innovative marketing methods - Branding and advertising - Content management system - Image and design tools - Social media and communication - Integration of technology in marketing - Writing skills for marketing - Marketing and sales - Customer relationship management
Operations	<ul style="list-style-type: none"> - Production processes - Quality management - Improved technical knowledge - Resource allocation strategies - Tracking performance efficiency - Organizational values and mission - Ensuring learning environment

SOFT SKILLS GAP

Based on the skills gap identified in the study, it is important to provide experienced workers with training in communication and teamwork skills and to promote workplace ethics to increase their levels of commitment, diligence, collaboration and client relations. The Leaders Consortium could work with training centres, schools and universities to incorporate work-life skills into supplementary sessions or extra-curricular activities.

TABLE 14:

Soft skills area	Soft skills training needs
Communication	Persuasive arguments Active listening Public speaking Interpersonal skills
Teamwork	Proactive thinking Understanding motivational needs Understanding attitudes
Creativity	Problem management Innovative thinking Conceptual thinking
Relationship Management	Empathetic outlook and sensitivity to others Self-assessment and self-improvement
Work Ethics	Job ethics Persistence Personal commitment Personal accountability

- CAREER GUIDANCE CENTRE

From the focus groups it was clear that jobseekers feel that they lack career guidance. Through municipalities and local NGOs, a career guidance centre could be established or reactivated to provide resources and training for jobseekers. This centre could provide orientation and information on markets, job types, possible tasks and information on market wages. This could help decrease the difference in expectations between workers and employers, as identified above, which may be contributing to the issue of inadequate work ethics reported by employers. The irregular nature of job search methods and tools, in addition to information from two FGDs, suggests that by providing orientation at training centres, including support in CV writing and interview preparation, jobseekers could better target their job search efforts, and therefore raise their chances of finding employment.

SME DEVELOPMENT

Leaders Consortium members could support the development of SMEs through two main avenues:

Providing investment support to improve competitiveness and market access; and by supporting the organizational capacities of SMEs to improve performance and competitiveness.

Here we summarize the programmatic implications and recommendations for both.

- INVESTMENT IN PROMISING SECTORS TO IMPROVE COMPETITIVENESS AND MARKET ACCESS

As previously mentioned, key to the growth of sectors that require machinery and technology in production is investment to facilitate access to technology, including procuring specialized machinery for use by local firms. This was highlighted repeatedly in consultation with key informants and in FGDs. Such investment, combined with the necessary training, could improve productivity, competitiveness and compliance with international standards for export-oriented production.

Supporting market access is another important area for intervention. Leaders Consortium members could leverage the regional and international networks to identify local efforts that need to be scaled up, as well as international partners to help open up international markets.

- BUILDING AWARENESS OF BUSINESS DEVELOPMENT SERVICES

Internationally, it is relatively common for firms to use Business Development Services during their lifetime. Using BDS rather than investing in in-firm expertise can save costs and even promote knowledge transfer between firms. The lack of knowledge about BDS within firms in the survey indicates potential for

improvement. Additionally, while field surveyors did provide examples of business development entities, including incubators, consulting firms, training programmes, recruitment agencies, associations and support programmes, it is possible that respondents still perceived BDS to be mainly related to training or financial provision, as some respondents included banks among their answers. Building a more supportive ecosystem for firms in Mount Lebanon, and increasing willingness and acceptance to use BDS, will likely require efforts to raise awareness of the potential benefit and range of BDS. This could be achieved through a well-designed and attractive awareness-raising campaign in selected areas. Leaders Consortium members could consider partnering with Chambers of Commerce and employers' organizations to organize informational sessions.

- Cost offsetting some BDS services

Leaders Consortium members could consider offsetting the cost of some key BDS services for firms in sectors of interest and those that are identified as promising and having labour absorption capacity. Another possibility is to partner directly with BDS providers to subsidize their services to some firms.

- ORGANIZING A BDS MATCHMAKING EVENT

Leaders Consortium members could consider setting up a local BDS matchmaking event, which would bring together key BDS providers and firms in that area. To incentivize firms to participate, members could offer to subsidize services provided for potential matches emerging from the event.

- BUILDING THE CAPACITY OF LOCAL BDS ENTITIES

While we cannot draw conclusions from the survey as to the quality of services provided by local BDS entities, we expect that they are not all of the highest quality, and that there is room for improvement. Leaders Consortium members could consider providing institutional capacity

building for local BDS entities themselves in order to improve the quality of their services that they provide, as well as providing them with marketing training to help them advertise their services more effectively.

- 'NEXT-LEVEL' BDS

Leaders Consortium members could complement existing efforts by providing the 'next-level' for BDS firms. For instance, Consortium members could map recently completed livelihood training sessions by local or international NGOs, e.g., training women in making home-made food products, and design BDS for the participants of the training programme to take their products to market or set up networks to support intraregional trade within Lebanon, as well as within export-markets, if applicable.

This 'next-level' BDS is still missing within the implemented livelihood programmes to a large extent; therefore, it is essential to improve the situation, as it would help in the completion of the cycle through to the marketing of products.

INCLUSION OF SYRIAN REFUGEES

- PROVISION OF LANGUAGE AND NON-SECTOR-SPECIFIC TRAINING FOR SYRIAN REFUGEES, ALONGSIDE OTHER SECTOR-SPECIFIC TRAINING

Members should offer training in sector-specific soft skills, notably communication skills and English language courses, given the language's importance in widening their education and employment opportunities and hence employment prospects among Syrians in Lebanon or elsewhere.

In agriculture, Syrians could be trained in the operation of specialized machinery for use in the food-related sector, including agro-food.

From an inclusion perspective, we recommend that sector-specific skills training for Syrians

not be restricted to the sectors that they are currently allowed to work in within Lebanon.

Training could be provided that will be beneficial within Lebanon if the sectors Syrians can work in are expanded in the future, or in another host country, or, ultimately, in Syria, to enable them to contribute to reconstruction efforts at home after the crisis.

- ADVOCACY FOR RESIDENCY POLICIES THAT INCLUDE THE RIGHT TO WORK

Over one million Syrian refugees now reside in Lebanon, according to recent registration records from the UNHCR. On average, Syrian workers receive monthly incomes that are 38% lower than the official minimum wage. In January 2016, a policy to end open entry took effect, which now requires legal residency to be either based on UNHCR registration or based on a sponsorship through a Lebanese national.

Without adequate protection, this sponsorship requirement makes Syrians in Lebanon more vulnerable to discriminatory practices and ties their employment options to their sponsor.

- SUPPORT FOR LIVELIHOOD OPPORTUNITIES AMONG SYRIAN WOMEN RESIDING IN LEBANON THROUGH THE PROVISION OF SHARED COMMUNITY CHILDCARE SERVICES

A major factor that is preventing women from being economically active is the lack of childcare support. In order to enable them to spend relatively more time on income-generating activities or to attend training workshops, livelihood programmes targeted at women could be coupled with other projects that provides childcare services, so that they may leave their children in care. This will allow women with children to attend training workshops, learn a skill and potentially to generate income for their families.

- SUPPORT FOR ANTI-DISCRIMINATION INITIATIVES

Support for anti-discrimination initiatives that protect Syrians from discriminatory labour practices, including grassroots level efforts by civil society, is important. Such support could also be achieved through initiatives to establish or partnering with local organizations and policy makers to create a safe and anonymous complaint mechanism to uncover abusive employers and take corrective legal and practical action to end the abuse.

POLICY ENVIRONMENT

- ADVOCACY FOR THE ALLEVIATION OF BARRIERS TO SME GROWTH

Given the importance of security-related barriers to a sector's growth potential in Lebanon, as the regional political situation continues to give cause for concern, it would be advisable for Leaders Consortium members to continue their advocacy efforts at local and international level to lobby the Lebanese government to move forward with a livelihoods strategy targeting Syrian refugees while preserving the work environment of Lebanese SMEs. That said, such advocacy is clearly of limited impact as the crisis in Syria and the political impasse in Lebanon continue. One of the key barriers that firms face is market competition. In this regard, designing programming to improve sector competitiveness could provide much-needed value. This links directly to the Leaders Consortium's objectives of livelihood promotion for Lebanese communities and Syrian refugees.

- REACTIVATION OF KEY ECONOMIC PUBLIC ENTITIES

Among the most important entities for the Lebanese economy and in the fight against corruption are two public autonomous agencies, The National Employment Office (NEO) – an

entity within the Ministry of Labour focused on job matching between supply and demand, and the Economic and Social Council (ECOSOC) a dialogue platform operating between social and economic actors that works to develop new policies. Unfortunately, due to clientelism, corruption and bureaucracy these two entities have been largely inactive. In order to help transform them into platforms for innovative economic and employment policy development, it will be important to gauge politicians' interests in reactivating them and providing them with the necessary organizational and technical assistance.

- ADVOCACY FOR THE REGULATORY EXPANSION OF SECTORS IN WHICH SYRIANS CAN LEGALLY WORK

Expanding the sectors in which Syrians can legally work is an important advocacy area for Leaders Consortium members, since it both expands opportunities and reduces the potential for abusive situations and exploitation arising from informal work relationships. Existing policies allow Syrians to work in the agriculture and construction sectors, and this is consistent with the primary hiring sectors, as discussed in the analysis above. Still, reports indicate that significant informal hiring is occurring in other sectors.

Advocacy among policy makers for social protection mechanisms for foreign workers in general, and Syrian workers in particular, is very important given the existing exploitative labour situations they face. Advocating that policy makers improve employers' compliance with minimum wages for Syrians would serve to improve their livelihoods, reduce the risk of their resorting to negative coping mechanisms to deal with socio-economic deprivation, and reduce wage-based competition between Syrians and Lebanese. This would need to be combined with right to work policies, otherwise it could result in the reduced hiring of Syrians.



ANNEX 1: LIST OF KEY INFORMANTS' INSTITUTIONS

INTERNATIONAL ORGANIZATIONS

1. UNDP – Livelihood and Local Economic Development – Beirut
2. UNDP – Socio Economic Development Department – Bekaa
3. IECD

PUBLIC AND PARA-PUBLIC INSTITUTIONS, SYNDICATES AND EDUCATIONAL/VOCATIONAL TRAINING INSTITUTES

1. Ministry of Social Affairs
2. National Employment Office
3. Chamber of Commerce, Industry and Agriculture – Zahle
4. Local Economic Development Agency (LEDA) – North
5. Tripoli Municipality – North
6. Tripoli Foundation
7. Jdeideh, Bouchrieh and Sadd Municipality – Mount Lebanon
8. Tripoli Traders Union
9. Syndicate of Goldsmiths and Jewellers in Lebanon – Burj Hammoud
10. University of Balamand Career Services Office
11. AUB FAS (faculty of arts & sciences) career services officer
12. TLC Training Institute – Mount Lebanon
13. Azm Institute – Tripoli

OTHER:

1. Tour guide and cultural heritage expert in Tripoli
2. Jewellery trader – Tripoli
3. Environmental expert

ANNEX 2: KEY INFORMANT INTERVIEW GUIDES

KEY INFORMANT INTERVIEW GUIDE – ASSOCIATIONS / MINISTRIES / LOCAL AUTHORITIES / UNIONS

Name:
Affiliation:
Position:

Phone number:
Email:
Region:

BUSINESS SECTOR POTENTIAL

1. Which sectors do you think are the most active sectors and have potential to grow?
 - a. Active sector: sector that is performing relatively well in terms of SME revenue growth and currently having a labour absorptive capacity.
 - b. Discuss SMEs within this sector, their characteristics and needs)
2. What are major promising subsectors in the specific regions of Zahleh, Baalback, Tripoli, Burj Hammoud, Dekwene, Baouchrieh, Jdeidet el Matn?
 - a. Focus on the coming two years.
3. How do you rate the current growth (in SME revenues) potential of the food services sector? How about that of the construction sector? Are there any other promising sectors?
4. Are there any sectors/subsectors that are shrinking in terms of SME revenue growth, and are no longer able to absorb additional labour? Name them.

BARRIERS FOR THE PRIVATE SECTOR TO REACH JOBSEEKERS

5. What are some external factors that mostly affect SMEs and their employability patterns?
 - a. How is this effect on employability manifested?
 - b. Think of the following: information about the market, financial assistance, government rules and regulations, competition, human power, skilled labour, transportation, raw material, technology, labour costs, security situation, weather.
6. From your point of view, do women have an equal, fair and well-guided (provided with proper orientation) access to vocational training opportunities? How about the youth?
 - a. What are the opportunity gaps?
 - b. [Record answers for each of women and youth]
 - c. [Think of region, economic status, culture, inadequate skills provided, etc...]

DESIRED AND PREFERRED EMPLOYABILITY PATTERNS BY SMES/HIRING PRACTICES

7. What are contract-related preferences that SMEs have regarding full-time employees, part-time employees, and other benefits?
 - a. Are there practices that SMEs follow related to contracts, which could be a cause for concern? [Think of unfair practices that put employees at risk, or practices that are not in compliance with laws]
 - b. Consider part-timers as either contract-based employees, or contractual workers who work on daily or hourly wage.
 - c. Discuss what has led to those practices

8. Do SMEs have different hiring preferences according to nationality?

- a. Are there sectors where SMEs tend to hire more non-Lebanese workers?
- b. Discuss reasons and major shifts over the past five years

9. Do SMEs have different hiring preferences according to gender?

- a. Are there sectors where SMEs tend to hire more women compared to men, or vice versa?
- Discuss reasons and major shifts over the past five years

10. Do SMEs have different hiring preferences according to age?

- a. Are there sectors where SMEs tend to hire more youth compared to adults, or vice versa?
- b. Discuss reasons and major shifts over the past five years

BUSINESS ECOSYSTEM AND SUPPORT SERVICES

11. Do you know of any existing institutions, programmes and/or initiatives that provide business support and vocational training?

- a. How would you assess their work and impact?
- b. Have you collaborated with any of them, and if so, how?
- c. Think of consulting, training, incubators...
- d. [Record answers for each of the specified institution, programme, or initiative]

12. Do you know of any interventions that address unemployment?

- a. What is being done?
- b. How is it being done?
- c. How would you assess those interventions?
- d. Discuss initiatives by local and central government institutions, international organizations, and other stakeholders). Record answers for each.

RECOMMENDATIONS AND WORKAROUNDS

13. If you could change one policy or procedure, what would it be? Why? Is there a current workaround? What is it?

14. Ask broad recommendation question based on interviewee's expertise.

KEY INFORMANT INTERVIEW GUIDE – VOCATIONAL TRAINING ENTITIES

Name:

Phone number:

Affiliation:

Email:

Position:

Region:

DESIRED AND PREFERRED SKILLS BY SMES/COMPETENCY NEEDS WITHIN PRIVATE SECTOR

1. Which technical skills do you provide? Could you specify those which you provide?
2. What are the main challenges that your graduates (and students) are facing in the job market?
 - a. Challenges related to the technical skills they obtain at your school
 - b. Challenges related to missing skills, specify them
3. Do you provide skills that are not purely technical? Think of life skills such as language, communication, computer, etc... How and when do you think your students acquire life skills?
4. How would you rate or describe the harmony between the programmes that are being taught at your school and the job required of your students in the job market?
5. In which areas/sectors do you feel recent graduates are finding numerous employment opportunities?
6. Which sectors are particularly lacking in employment opportunities for graduates in the past three to five years?

RECOMMENDATIONS ON VOCATIONAL TRAINING CURRICULA

Relationship with SMEs:

7. How do you go about selecting which courses to provide, how do you design the curricula, and how often do you update the curricula? Do you collaborate with companies in the sectors relevant to the skills that you provide? Is any training provided directly by companies in that sector? How do you go about adapting your curricula to better suit the job market? (Think of periodic curricula reviews.) Do the curricula incorporate different learning styles and activities, including project work?
8. Do you usually send your students on internships inside companies? How often? Why or why not? (Discuss the benefits and feasibility of integrating internships into vocational training programmes.)
9. How often do you interact with companies to check their needs, their assessment of the graduates' capacity?
 - a. How does the interaction occur?
 - b. Do you think this level of interaction is sufficient?
10. Are you able to attract good-quality vocational teachers? Why and why not?
11. What does the student journey look like? (Think of how students find about the course, which courses they choose, where they train within the workplace, mentorship, whether they are supported in job search and interview preparation.)

SKILLS GAPS AND SKILLS MATCH – PRIVATE SECTOR

12. What steps do you take to improve the readiness of your graduates for the job market? (Think of job search assistance, interview tips) Do you facilitate interviews with companies in that sector?

13. In your opinion, what are the procedures used by companies to make sure their employees meet their specific skill needs? Do you have specific examples?

14. How, in your opinion, can an effective match between skills demand and skills supply be established? Are there entities/initiatives that effectively play the role of mediators between trainees and the private sector? Do you know if there is coordination or collaboration between them?

EXPERIENCE AND EDUCATION DESIRED BY PRIVATE SECTOR COMPANIES

15. Has vocational training at your school/centre practically affected the chances and speed of graduates finding jobs?

- a. Are there standard qualifications that you equip your students with?
- b. Are your students finding jobs that match their skills or jobs that are unrelated to the vocational training?

16. From your point of view, do women have an equal, fair and well-guided (provided with proper orientation) access to vocational training opportunities? How about the youth?

- a. What are the opportunity gaps?
- b. Record answers for each of women and youth
- c. Think of region, economic status, culture, inadequate skills provided, etc...

RECOMMENDATIONS AND WORKAROUNDS

17. If you could change one policy, procedure or programme what would it be? Why? Is there a current workaround? What is it?

ANNEX 3: FOCUS GROUP DISCUSSION GUIDE

FGD EMPLOYERS (FORMAL AND INFORMAL SMES)

DESIRED AND PREFERRED SKILLS BY SMES/COMPETENCY NEEDS WITHIN PRIVATE SECTOR

1. What are the skills that you think employees lack other than technical skills? (Think of life skills such as language, communication, computer, etc...)

2. How are the tasks distributed and assigned in your companies? (who does what?) Does every employee have a clear set of tasks to perform? Are those tasks communicated with employees prior to employment?
3. Do you think employees are well prepared for the technical job that they do? What are the specific skills that employees lack when they are first recruited? What kinds of training are they missing, and why?
4. Do you provide training to your employees? If not, why? If yes, what are the skills that you train them on? Is this training internal (i.e., provided by the company) or external (i.e., provided by external trainers)?
5. If you think of the employees who perform well at their technical tasks, what is their background in terms of education, training and experience? Which of the latter has played the most major role in preparing them for the job?
6. Which of the following fields do you think your company excels at? Management, marketing, finance and accounting, operations, other? Why do you think your company performs better in the field that you just specified? (Is it due to external/internal training? Or due to specialized technical competencies? Etc...)
7. In which of those fields do you feel your company needs extensive training and support? What is the exact type of support that you think would be most valuable? What are the exact skills that you think your company needs?

SKILLS GAPS AND SKILLS MATCH

8. How do you go about adapting the skills of your employees to meet your company needs? Ideally, are there any preferred procedures that you would use in order to help your employees adapt to the specific skills needed at your company? What are the barriers that keep you from achieving this? (Think of financial barriers, competency barriers, time barriers, etc...)
9. What is your usual recruitment strategy, i.e., how and where do you find the persons with the required skills and how do you approach them? How do you find this process? (smooth, could be improved, difficult, etc...)? (Discuss ways to make recruitment more effective)
10. What do you do when you cannot find appropriate candidates? Who do you reach out to? Have you ever referred to entities/initiatives that helped you recruit? Were they able to find you candidates with matching skills? Explain.

EXPERIENCE AND EDUCATION DESIRED BY PRIVATE SECTOR COMPANIES

11. What is the preferred background that you look for when recruiting: in terms of education, training and past experience?
 - a. Please explain why. (Example: because of more specific skills, less pay, etc...)
 - b. Record answers for each of education, training and past experience.

DESIRED AND PREFERRED EMPLOYABILITY PATTERNS BY SMES/HIRING PRACTICES

12. What are your current recruitment preferences? Do you prefer to have full-time employees, part-time employees, interns, or contractual workers? What benefits do you offer? What are the procedures that you undergo or avoid and why?

13. If you hire part-time employees (including contractual workers), why do you hire them? Is the hiring of part-time employees efficient in terms of needed skills? How is it different from full-time employees in this regard? (Discuss ratio of full-time to part-time, risks of hiring part-time employees and whether part-timers are registered.)

14. What is the ratio of female to male employees at your companies? Is this due to any specific reason? How many women hold leadership and decision-making positions in your company? If not many, why do you think that is?

15. Have you heard of or been involved in youth employment programmes and initiatives? Have you considered any type of collaboration between your company and youth-serving NGOs? Have you ever sponsored youth events?

16. Have you changed salaries over the past three years? How have you changed them? How do you make salary adjustment decisions? (internal and external factors)

RECOMMENDATIONS AND WORKAROUNDS

17. If you could change one policy or procedure, which would it be? Why? Is there a current workaround? What is it?

18. In your opinion, are there any specific skills that are in over-supply in the market? If yes, could you please list them?

FGD – EMPLOYEES (WOMEN AND YOUTH)

DESIRED AND PREFERRED SKILLS BY SMES/COMPETENCY NEEDS WITHIN PRIVATE SECTOR

1. Do you know how are the tasks distributed and assigned in the companies you work in? (who does what?) Is there clarity about the distribution of roles? Do you think that your company needs to reshuffle employees and their tasks for a better overall performance?

2. Were you shown a specific list of tasks prior to employment? How were these expected tasks communicated to you? (think of a meeting with HR, a meeting with the direct manager to explain tasks, etc.)

3. Did you feel ready for the technical job that you do when you were first recruited? What, among your previous education/training/work experience, has played the major role in preparing you for the tasks that you do?

4. Does your company provide you with regular training opportunities? (Discuss the training content and whether it is external or internal)
5. What are the specific skills that you think would be valuable to you and that you wish to be trained on?
6. Do you think your company excels or experiences weaknesses in any of the following fields: management, marketing, finance and accounting, operations, other? What is the main reason behind this?

SKILLS GAPS AND SKILLS MATCH

7. How did you get this job? Walk me through the process. Was it a smooth process? Why was it smooth? If it was difficult, how so? Are your friends finding it difficult to get jobs?
8. What could have been useful for you to better meet the specific skills needed at your workplace? Why do you think it did not happen?
9. Does your job fit your expectations in terms of the skills required from you? Are you able to perform at your utmost capacity within your workplace? Are you facing specific challenges?

EXPERIENCE AND EDUCATION DESIRED BY PRIVATE SECTOR COMPANIES

10. What in your opinion will most likely help you find a job that matches your skills? (think of having a university degree, having a vocational training degree, having a secondary school degree only, your past experience, or your connections)
11. Describe your access to vocational training opportunities (equal, fair, and well-guided (provided with proper orientation)? Are there barriers to this access? (Think of region, economic status, culture, inadequate skills provided, etc...)

DESIRED AND PREFERRED EMPLOYABILITY PATTERNS BY SMES/HIRING PRACTICES

12. Do employees change their jobs in the field that you work in? What is the most common reason for changing jobs?
13. How are full-time and part-time employees distributed in the firm that you work in? What are the different types of tasks that each takes over? Discuss the incentives to work as a part-timer.
14. From the experience at your company, what do you think of the skill sets of Lebanese and non-Lebanese workers? (Probe: do non-Lebanese workers fill a gap in skills that is not found in Lebanese workers?)
15. Are there any discrepancies in the skills acquired by men and women at your workplace? Is this just a coincidence or the result of other factors? Please elaborate (Think of access to training opportunities, culture, marital status, etc...)
16. Do you think that salaries are satisfactory in your field of work? Are they what you expected?

Do they reflect the level of skills that employees acquire?

RECOMMENDATIONS AND WORKAROUNDS

17. If you could change one policy, procedure or programme, which would it be? Why? Is there a current workaround? What is it?

18. In your opinion, are there any specific skills that are in over-supply in the market? If yes, could you please list them?

FGD – JOBSEEKERS

DESIRED AND PREFERRED SKILLS BY SMES/COMPETENCY NEEDS WITHIN PRIVATE SECTOR

1. In the course of applying for jobs, do you feel that companies are clear about the tasks they expect from potential employees?

2. What do you think is missing in the technical training that you have received? Would filling this gap increase your chances of being hired?

SKILLS GAPS AND SKILLS MATCH

3. Based on your own experience, describe the likelihood of finding opportunities that match the skill sets of jobseekers

4. How would you describe your ability to identify which opportunities best match your skill set? (On the company side, think of clarity of job vacancy information and job descriptions; on the jobseeker side, think of knowing how to look for jobs and filtering by skills types etc.)

5. How are you looking for and applying to jobs? Are there any useful platforms/initiatives? Who do you reach out to for help? Have you gone to any career guidance centres?

6. What would be an idea/initiative/platform that would help you reach out to the most suitable opportunities for your skills?

EXPERIENCE AND EDUCATION DESIRED BY PRIVATE SECTOR COMPANIES

7. What in your opinion will most likely help you find a job that matches your skills? (think of having a university degree, having a vocational training degree, or having a secondary school degree only, your past experience, or the connections you have)

8. Describe your access to vocational training opportunities (equal, fair, and well-guided (provided with proper orientation)? Are there barriers to this access? (Think of region, economic status, culture, inadequate skills provided, etc...)

DESIRED AND PREFERRED EMPLOYABILITY PATTERNS BY SMES/HIRING PRACTICES

9. Do employees change their jobs in the field that you work in? What is the most common reason for changing jobs?
10. What could be the incentives to work as a part-timer (on daily or hourly wage base) as opposed to getting a full-time job? Would you consider working part-time? Or as an intern?
11. Do you think that gender influences the chances of finding a job? Elaborate.
12. In your opinion, are salaries in the job market reflective of the skills demanded by companies?

RECOMMENDATIONS AND WORKAROUNDS

13. If you could change one policy or procedure, which would it be? Why? Is there a current workaround? What is it?
14. Among jobseekers in the market, do you think there are skills that are in over-supply and that employers do not require?

ANNEX 4: SKILLS GAP ANALYSIS – SME SURVEY

1. INTERVIEWER DETAILS

- (a) Full Name
- (b) Date of Interview
- (c) Place of Interview

ENTERPRISE PROFILE

2. ENTERPRISE PROFILE

- (a) Name of Interviewee
- (b) Name of Enterprise
- (c) Position of Interviewee
- (d) Interviewee Tel
- (e) Interviewee Email

3. INTERVIEWEE YEARS OF EXPERIENCE (SELECT ONE OPTION) سنوات الخبرة

- ☐ Less than 5 years
- ☐ Between 6 and 10 years
- ☐ Between 11 and 15 Years
- ☐ More than 16 Yeas

4. ENTERPRISE DETAILS تفاصيل عن المؤسسة

(a) CEO Name (If same as interviewee, write the same name again)

(b) CEO Tel. (If different than interviewee):

(c) Enterprise Address:

(d) Village:

(e) Caza:

(f) Enterprise Tel.:

(g) Enterprise Fax.:

(h) Enterprise Email:

(i) Website:

5. YEARS OF OPERATIONS SINCE START OF BUSINESS عدد سنوات عمل المؤسسة (SELECT ONE OPTION)

- ☐ 0–3 Years
- ☐ 4–5 Years
- ☐ 6–10 Years
- ☐ More than 11 Years

6. THE ENTERPRISE IS (SELECT ONE OPTION)

- ☐ Registered (Complete Official Registration)
- ☐ Not Registered (if not complete, please check not registered)

7. IF REGISTERED, IT IS A/AN (SELECT ONE OPTION) نوع المؤسسة

☐ Branch of a Foreign Company فرع لشركة أجنبية

☐ Civil Company شركة مدنية

هذه الشركات التي يكون نشاطها الأصلي أعمالاً مدنية وتخضع للقانون المدني

☐ Cooperative تعاونية

☐ S.A.L. شركة مساهمة لبنانية

شركة عارية من العنوان تؤلف بين ثلاثة أشخاص أو أكثر يكتبون بأسمهم أي أسناد قابلة للتداول ولا يكونون مسؤولين عن ديون الشركة إلا بقدر ما وضعوه من المال.

☐ Offshore شركة المحصور نشاطها خارج لبنان

☐ S.A.R.L. الشركة المحدودة المسؤولة

تعقد هذه الشركة بين ثلاثة أشخاص أو أكثر على أن لا يتجاوز عدد الشركاء العشرين إلا في حالة انتقال الحصص بالإرث. على أنه إذا زاد عدد الشركاء عن ثلاثين وجب، في مهلة سنتين، تحويل الشركة إلى شركة مساهمة فإذا لم تحول وجب حلها.

☐ شركات التضامن

شركة التضامن هي التي تعمل تحت عنوان معين لها وتؤلف ما بين شخصين أو عدة أشخاص مسؤولين بصفة شخصية وبوجه التضامن عن ديون الشركة.

☐ شركة المحاصة:

هي شركات مستترة ليس لها وجود ظاهر أمام الغير ولا شخصية معنوية ويقوم بأعمالها أحد الشركاء أو بعضهم، يمكن تكوين شركة محاصة لمشروع واحد أو لعدة مشاريع، إن أرباح شركة المحاصة توزع فيما بين أصحابها، ويصرح كل منهم عن حصته ضمن تصريحه الشخصي السنوي.

☐ شركات التوصية البسيطة:

هي التي تقوم بأعمالها تحت عنوان تجاري تشمل فئتين من الشركاء أولاهما فئة الشركاء المفوضين أو المتضامنين الذين يحق لهم أن يقوموا بأعمال الشركة وهم مسؤولون بصفتهم الشخصية وبوجه التضامن عن إيفاء ديون الشركة، والثانية فئة الشركاء الموصين الذين يقدمون المال ولا يلزم كل منهم إلا بنسبة ما قدمه.

☐ شركة التوصية بالأسهم:

شركة التوصية التي تقوم بأعمالها تحت عنوان تجاري تشمل فئتين من الشركاء أولاهما فئة الشركاء المفوضين الذين يحق لهم دون سواهم أن يقوموا بأعمالها الإدارية وهم مسؤولون بصفتهم الشخصية وبوجه التضامن عن إيفاء ديون الشركة، والثانية فئة الشركاء الموصين الذين يقدمون المال ولا يلزم كل منهم إلا بنسبة ما قدمه.

☐ Holding شركة قابضة

توظيف الأموال في تملك الأسهم والحصص في شركات أخرى وإدارة الشركات التابعة

☐ Other (Please specify) _____

8. WHAT IS THE SECTOR YOU WORK IN قطاع العمل

*When the interviewee chooses the sector, make sure to ask him/her about the relevant subsector(s) – question 9 or 10 or 11 or 12 or 13.

☐ Services And Repair خدمات

☐ Wholesale and Retail تجارة الجملة والتجزئة

☐ Manufacturing/Industry صناعة

☐ Construction إنشاءات

- ☐ Agriculture الزراعة
- ☐ Other (Please specify) _____

9. IF AGRICULTURE, PLEASE SPECIFY THE ACTIVITY(IES) القطاع الفرعي - الزراعة

- ☐ Food crops (wheat, fruit, vegetable, nuts, spices, etc...) المحاصيل الغذائية
- ☐ Industrial crops (cotton, tobacco, etc...) المحاصيل الصناعية
- ☐ Oil and oil seeds (pre-industry agriculture) الزيت والبذور الزيتية
- ☐ Livestock تربية الماشية
- ☐ Horticulture (flowers, aesthetic agriculture) البستنة
- ☐ Viticulture (vines, pre-wine production) زراعة الكروم
- ☐ Dairy (pre-dairy production) منتجات الألبان
- ☐ Fishing صيد السمك
- ☐ Other (Please specify) _____

10. IF CONSTRUCTION, PLEASE SPECIFY THE ACTIVITY(IES) - القطاع الفرعي إنشاءات

- ☐ Building materials & fixtures مواد البناء والتجهيزات
- ☐ Heavy construction البناء الثقيل
- ☐ Infrastructure works أعمال البنية التحتية
- ☐ Other (Please specify) _____

11. IF MANUFACTURING/INDUSTRY, PLEASE CHOOSE THE TYPE OF ACTIVITY(IES) صناعة - القطاع الفرعي

- ☐ Agro-industry (food processing: dairy products, winery, brewery, chocolate), etc... الصناعات الغذائية
- ☐ Furniture production إنتاج الأثاث
- ☐ Textile production إنتاج المنسوجات
- ☐ Packaging and containers التعبئة والتغليف والحاويات
- ☐ Electronic/electrical components and equipment الادوات الإلكترونية / الكهربائية والمعدات
- ☐ Industrial machinery (industrial engineering) الآلات الصناعية
- ☐ Pharmaceutical industry صناعة الأدوية
- ☐ Metals المعادن
- ☐ Energy الطاقة
- ☐ Construction materials and equipment (pipes, tiles, etc...) مواد البناء والمعدات
- ☐ Other (Please specify) _____

12. IF WHOLESALE AND RETAIL, PLEASE CHOOSE THE TYPE OF ACTIVITY(IES)- القطاع الفرعي تجارة الجملة والتجزئة

- ☐ Technology hardware & equipment الأجهزة والمعدات التكنولوجية
- ☐ Computers, phones, & household electronics أجهزة الكمبيوتر والهواتف والأجهزة الإلكترونية المنزلية
- ☐ Utilities (alternative electricity, water, gas, multi-utilities) المرافق
- ☐ Food and beverage retail المواد الغذائية والمشروبات بالتجزئة
- ☐ Pharmaceutical & biotechnology retail الأدوية والتكنولوجيا الحيوية بالتجزئة
- ☐ Household goods (house furniture, apparels, stationery, etc...) بضائع منزلية
- ☐ Tobacco تبغ
- ☐ Leisure goods (sports equipment, music, toys, etc...) السلع الترفيهية
- ☐ Educational goods السلع التعليمية
- ☐ Clothing & accessories ملابس و إكسسوارات
- ☐ Automobiles & auto parts سيارات وقطع غيار السيارات
- ☐ Textiles المنسوجات
- ☐ Healthcare equipment and supplies معدات ولوازم الرعاية الصحية
- ☐ Other (Please specify) _____

13. IF SERVICES AND REPAIR, PLEASE SPECIFY THE ACTIVITY(IES) خدمات - القطاع الفرعي

- ☐ Education services خدمات التعليم
- ☐ Healthcare services خدمات الرعاية الصحية
- ☐ Hotels الفنادق
- ☐ Restaurants المطاعم
- ☐ Insurance تأمين
- ☐ Real estate العقارات
- ☐ Social work العمل الاجتماعي
- ☐ Media services خدمات إعلامية
- ☐ Software & computer services البرمجيات وخدمات الكمبيوتر
- ☐ Advertising services خدمات الدعاية والإعلان
- ☐ Technology technician services خدمات فنية تكنولوجية
- ☐ Free works أعمال حرة
- ☐ Travel & tourism services خدمات للسياحة والسفر
- ☐ Leisure & entertainment services خدمات الترفيه
- ☐ Banking & financial services خدمات مصرفية ومالية
- ☐ Freight & logistics services الشحن والخدمات اللوجستية
- ☐ Passenger transportation services (ex: taxis) خدمات نقل الركاب
- ☐ Architecture and engineering consulting services الهندسة المعمارية والخدمات الهندسية الاستشارية
- ☐ Other (Please specify) _____

14. YOUR ENTERPRISE ANNUAL SALES TURNOVER IS **حجم المبيعات السنوي**

- ☐ \$1000-\$10,000
- ☐ \$11,000-\$50,000
- ☐ \$51,000-\$250,000
- ☐ \$251,00-\$500,000
- ☐ \$501,000-\$1,000,000
- ☐ \$1,000,001-\$5,000,000
- ☐ \$5,000,001-\$20,000,000
- ☐ \$20,000,001-\$50,000,000
- ☐ >\$50,000,000
- ☐ Other (Please specify) _____

15. DO YOU ANTICIPATE BUSINESS (REVENUE) GROWTH IN THE NEXT YEAR? (SELECT ONE OPTION) **هل تتوقع نمو الأعمال التجارية في العام المقبل**

- ☐ Yes
- ☐ No

16. IF YES, PLEASE SPECIFY WHY

17. IF NO, PLEASE SPECIFY WHY

18. IF YES, INDICATE THE GROWTH PERCENTAGE YOU ANTICIPATE (SELECT ONE OPTION) **ما هي نسبة النمو المتوقعة**

- ☐ <10%
- ☐ 11%- 30%
- ☐ 31%-50%
- ☐ 51%-100%
- ☐ >100%
- ☐ I don't know

Choose the sectors that you anticipate will grow (in revenue) during the next year in your district or area – and please specify the sub-categories **اختر القطاعات التي تتوقع نموها خلال العام المقبل في القضاء - ويرجى تحديد القطاع الفرعي - راجع الورقة المنفصلة للقائمة**

19. GROWTH IN SECTORS

- (a) Services and Repair خدمات
- (b) Wholesale and Retail تجارة الجملة والتجزئة
- (c) Manufacturing/Industry صناعة
- (d) Construction إنشاءات
- (e) Agriculture الزراعة

Choose 5 (FIVE ONLY) challenges that affect your enterprise the most اختر خمسة تحديات الأكثر تأثيرا على المؤسسة

20. TOP FIVE CHALLENGES

- (a) Lack of Information about the market (Select one option) عدم وجود معلومات عن السوق
- (b) Access to financial assistance (Select one option) الحصول على مساعدات مالية
- (c) Government rules and regulations (Select one option) القوانين الحكومية
- (d) Competition in the market (Select one option) المنافسة في السوق
- (e) Availability of human power (Select one option) توافر الموارد البشرية
- (f) Lack of skilled labour for your business (Select one option) عدم وجود المهارات الضرورية للعمل
- (g) Transportation of employees (Select one option) نقل الموظفين
- (h) Access to raw material (Select one option) الحصول على المواد الخام
- (i) Access to technology (Select one option) الحصول على التكنولوجيا
- (j) Labour costs (Select one option) تكاليف اليد العاملة
- (k) Costs of raw material (Select one option) تكاليف المواد الخام
- (l) Security situation (Select one option) الوضع الأمني
- (m) Weather (Select one option) حالة الطقس
- (n) Political instability (cultural, sectarian divisions) (Select one option) عدم الاستقرار السياسي

21. THE SYRIAN CRISIS IMPACTS YOUR BUSINESS: (SELECT ONE OPTION) تأثير الأزمة السورية على العمل

- ☐ Positively
☐ Negatively
☐ Doesn't impact my business

22. IF POSITIVELY, PLEASE NAME THREE MAIN EFFECTS

(a)

(b)

(c)

23. IF NEGATIVELY, PLEASE NAME THREE MAIN EFFECTS

(a)

(b)

(c)

Name the top three sectors that employ Syrians the most

ما هي القطاعات الثلاث الأكثر توظيفاً للسوريين - ويرجى تحديد القطاع الفرعي - راجع الورقة المنفصلة للقائمة

24. SECTOR THAT WILL EMPLOY SYRIANS

- (a) Services and Repair (Select one option) خدمات
 (b) Wholesale and Retail (Select one option) تجارة الجملة والتجزئة
 (c) Manufacturing/Industry (Select one option) صناعة
 (d) Construction (Select one option) إنشاءات
 (e) Agriculture (Select one option) الزراعة

25. Subsector

(a) Services and Repair

(b) Wholesale and Retail

(c) Manufacturing/Industry

(d) Construction

(e) Agriculture

26. WHY DO THEY EMPLOY SYRIANS? لماذا يوظفون السوريين

- ☐ Cheaper labour اليد العاملة رخيصة
- ☐ Skilled labour اليد العاملة ماهرة
- ☐ Lebanese people wouldn't do the job اللبناني لا يقوم بهذا العمل
- ☐ NGOs supported Syrian employment المنظمات غير الحكومية الدولية دعمت توظيف السوريين
- ☐ Personal connections العلاقات الشخصية
- ☐ Other (Please specify) _____

27. HOW MANY «FULL-TIME STAFF» ARE CURRENTLY WORKING FOR THE ENTERPRISE? (INCLUDING YOURSELF) (SELECT ONE OPTION) كم عدد الموظفين بدوام كامل حاليا في الشركة؟ (بما في ذلك بنفسك)

- ☐ Less than 10
- ☐ 10 to 50
- ☐ 50 to 200
- ☐ More than 200

28. HOW MANY «PART-TIME STAFF» ARE CURRENTLY WORKING FOR THE ENTERPRISE? (INCLUDING YOURSELF) كم عدد الموظفين بدوام جزئي حاليا في الشركة؟ (بما في ذلك بنفسك)

- ☐ Less than 10
- ☐ 10 to 50
- ☐ 50 to 200
- ☐ More than 200

29. DO YOU EMPLOY NATIONALITIES OTHER THAN THE LEBANESE NATIONALITY? (SELECT ONE OPTION) هل توظف أفراد من غير الجنسية اللبنانية (اختر خياراً واحداً)

- ☐ Yes
- ☐ No

30. IF YES, PLEASE CHOOSE (FROM BELOW) THE REASONS WHY: لماذا، نعم، كانت الإجابة نعم،

- ☐ Cheaper labour اليد العاملة رخيصة
- ☐ Skilled labour اليد العاملة ماهرة
- ☐ Lebanese people wouldn't do the job اللبناني لا يقوم بهذا العمل
- ☐ INGOs supported Syrian employment المنظمات غير الحكومية الدولية دعمت توظيف السوريين
- ☐ Other (Please specify) _____

31. IF YES, PLEASE INDICATE THE PERCENTAGE OF EMPLOYEES FROM EACH OF THE FOLLOWING NATIONALITY:

إذا كانت الإجابة نعم، يرجى الإشارة إلى نسبة العاملين من كل من الجنسيات التالية

Lebanese nationality

%

Syrian nationality

%

Palestinian nationality

%

Other nationality

%

32. PLEASE INDICATE THE PERCENTAGE OF FEMALE EMPLOYEES IN YOUR ENTERPRISE (SELECT ONE OPTION) يرجى الإشارة إلى نسبة الموظفات الاناث في المؤسسة

- ☐ 0
- ☐ less than 10%
- ☐ Between 11 and 20%
- ☐ Between 21 and 50%
- ☐ More than 50%

33. PLEASE INDICATE THE NUMBER OF EMPLOYEES WITHIN EACH AGE BRACKET يرجى الإشارة إلى عدد الموظفين ضمن كل فئة عمرية

- (a) Below 15
- (b) 16–18 How many?
- (c) 19–22 How many?
- (d) 23–30 How many?
- (e) 31–40 How many?
- (f) 41–50 How many?
- (g) 51–64 How many?
- (h) Over 64 How many?

34. WHAT IS THE FULL-TIME EMPLOYEE TURNOVER RATE AT YOUR ENTERPRISE PER YEAR (SELECT ONE OPTION) ما هو المعدل السنوي لشغور الوظائف بدوام كامل

- ☐ Less than 5%
- ☐ Between 6 and 10%
- ☐ Between 11 and 20%
- ☐ Over 20%

35. WHAT IS THE <PART TIME> EMPLOYEE TURNOVER RATE AT YOUR ENTERPRISE PER YEAR? (SELECT ONE OPTION) ما هو المعدل السنوي لشغور الوظائف بدوام جزئي

- ☐ Less than 5%
- ☐ Between 6 and 10%
- ☐ Between 11 and 20%
- ☐ Over 20%

36. NAME THE TOP 5 POSITIONS WITH THE HIGHEST TURNOVER: ما هي الوظائف 5 الأكثر شغور

- (a)
- (b)
- (c)
- (d)
- (e)

37. PLEASE SPECIFY WHY لماذا

- ☐ Downsizing تقليل الأعمال
- ☐ Low wages
- ☐ Working conditions
- ☐ Employees seeking better jobs بحث الموظفين عن وظائف أفضل
- ☐ Personal reasons أسباب شخصية
- ☐ Unqualified نقص المؤهلات
- ☐ Termination of contract إنهاء العقد
- ☐ Other (Please specify) _____

38. PLEASE INDICATE THE FIVE BIGGEST INTERNAL CHALLENGES AFFECTING

YOUR BUSINESS'S GROWTH يرجى الإشارة إلى 5 تحديات داخلية أساسية تؤثر على نمو الأعمال التجارية الخاصة بك

- ☐ Human resources – Weak policies and procedures الموارد البشرية - السياسات والإجراءات الضعيفة
- ☐ Human resources – Lack of managerial skills الموارد البشرية - نقص المهارات الإدارية
- ☐ Human resources – Lack of technical skills الموارد البشرية - نقص المهارات الفنية
- ☐ Human resources – Lack of business skills الموارد البشرية - نقص المهارات التجارية
- ☐ Human resources – Lack of soft skills الموارد البشرية - نقص المهارات التصرفاتية
- ☐ Human resources – Work ethics الموارد البشرية - أخلاقيات العمل
- ☐ Human resources – Work relations الموارد البشرية - علاقات العمل
- ☐ Human resources – Salary satisfaction الموارد البشرية - الاقتناع بالراتب
- ☐ Human resources – Employee turnover الموارد البشرية - شغور الوظائف
- ☐ Financial Management – Weak financial reporting الإدارة المالية - التقارير المالية الضعيفة
- ☐ Financial Management – Weak budget management الإدارة المالية - إدارة الميزانية الضعيفة
- ☐ Financial Management – Weak cash flow management الإدارة المالية - ضعف إدارة التدفقات النقدية
- ☐ Financial Management – High fixed costs الإدارة المالية - ارتفاع التكاليف الثابتة
- ☐ Financial Management – Weak accounting system الإدارة المالية - النظام المحاسبي ضعيف
- ☐ Marketing – Low quality of product/Service التسويق - جودة المنتج / الخدمة منخفضة
- ☐ Marketing – Weak advertising التسويق - الإعلان ضعيف
- ☐ Marketing – Weak packaging التسويق - التعبئة والتغليف ضعيفان
- ☐ Marketing – Weak usage of digital tools التسويق - استخدام ضعيف للأدوات الرقمية
- ☐ Marketing – Inadequate pricing التسويق - تسعير غير ملائم
- ☐ Operations – Shortage of quality equipment العمليات - نقص في نوعية المعدات
- ☐ Operations – Weak maintenance services العمليات - خدمات الصيانة ضعيفة
- ☐ Operations – Weak production process العمليات - عملية الإنتاج ضعيفة
- ☐ Operations – Low use of technology العمليات - قلة استخدام التكنولوجيا
- ☐ Operations – Weak administration العمليات - الإدارة ضعيفة
- ☐ Other (Please specify) _____

39. IN THE LAST THREE YEARS, HAS YOUR ENTERPRISE HIRED NEW FULL-TIME POSITIONS? (SELECT ONE OPTION) في السنوات الثلاث الماضية، هل وظفت المؤسسة وظائف بدوام كامل جديدة

- ☐ Yes
☐ No

40. IN THE LAST THREE YEARS, HAS YOUR ENTERPRISE HIRED NEW PART-TIME POSITIONS? (SELECT ONE OPTION) في السنوات الثلاث الماضية، هل وظفت المؤسسة وظائف بدوام جزئي جديدة

- ☐ Yes
☐ No

41. IN THE LAST TWO YEARS HAS YOUR ENTERPRISE HIRED ANY JOBSEEKERS WHO WERE FINISHING THEIR SECONDARY SCHOOL; TECHNICAL AND VOCATIONAL SCHOOLS; OR UNIVERSITY OR RIGHT AFTER THEIR GRADUATION

(SELECT ONE OPTION) في السنتين الأخيرتين، هل وظفت المؤسسة أفراد في طور انتهاء دراستهم الثانوية؛ الفنية والمهنية أو الجامعية أو مباشرة بعد تخرجهم

- ☐ Yes
☐ No

42. IF YES, INDICATE IF THEY HAVE BEEN: إذا كان الجواب نعم، تبين أنهم كانوا

- ☐ First jobseekers coming from secondary school طلاب دراسة ثانوية
☐ First jobseekers coming from technical and vocational school طلاب دراسة فنية ومهنية
☐ First Jobseekers coming from university or other higher education institution طلاب جامعيين
☐ Other (Please specify) _____

43. IF «FIRST JOBSEEKERS COMING FROM SECONDARY SCHOOL», PLEASE INDICATE HOW READY THEY WERE TO FILL THE NEW POSITION: (SELECT ONE OPTION)

- 4 Very poorly prepared
3 Poorly prepared
2 Prepared
1 Well prepared
0 Very well prepared

46. FOR FIRST JOBSEEKERS COMING FROM TECHNICAL AND VOCATIONAL SCHOOL, INDICATE IN WHICH OF THE FOLLOWING AREAS WERE THEY LACKING PREPARATION (IF APPLICABLE)

- ☐ Lack of required skills or competencies (e.g. technical or job-specific skills, IT skills, problem solving skills, team working skills) **نقص المهارات المطلوبة أو الكفاءات (مهارات فنية معينة، ومهارات مهارات حل المشاكل، ومهارات فريق العمل)**
- ☐ Literacy/numeracy skills **مهارات القراءة والكتابة / الحساب**
- ☐ Poor education **ضعف التعليم**
- ☐ Lack of soft skills (teamwork, problem solving, communication) **نقص المهارات التصريفية (عمل الفريق، حل المشكلات، والتواصل)**
- ☐ Poor attitude/personality or lack of motivation (e.g. poor work ethic, punctuality, appearance, manners) **عدم ملائمة التصرفات / نقص الحافز (على سبيل المثال أخلاقيات العمل، الالتزام بالمواعيد، والمظهر والأخلاق)**
- ☐ Lack of working world/life experience or maturity (including general knowledge) **نقص التجربة الحياتية أو النضج**
- ☐ None of the above
- ☐ Other (Please specify) _____

47. IF «FIRST JOBSEEKERS COMING FROM UNIVERSITY OR OTHER HIGHER EDUCATION INSTITUTION», PLEASE INDICATE HOW READY THEY WERE TO FILL THE NEW POSITION: [SELECT ONE OPTION]

- 4 Very poorly prepared
3 Poorly prepared
2 Prepared
1 Well prepared
0 Very well prepared

48. FOR FIRST JOBSEEKERS COMING FROM UNIVERSITY OR OTHER HIGHER EDUCATION INSTITUTION, INDICATE IN WHICH OF THE FOLLOWING AREAS WERE THEY LACKING PREPARATION (IF APPLICABLE)

- ☐ Lack of required skills or competencies (e.g. technical or job-specific skills, IT skills, problem solving skills, team working skills) **نقص المهارات المطلوبة أو الكفاءات (مهارات فنية معينة، ومهارات (تكنولوجيا المعلومات ومهارات حل المشاكل، ومهارات فريق العمل)**
- ☐ Literacy/numeracy skills **مهارات القراءة والكتابة / الحساب**
- ☐ Poor education **ضعف التعليم**
- ☐ Lack of soft skills (teamwork, problem solving, communication) **نقص المهارات التصريفية (عمل) (الفريق، حل المشكلات، والتواصل)**
- ☐ Poor attitude/personality or lack of motivation (e.g. poor work ethic, punctuality, appearance, manners) **عدم ملائمة التصرفات / نقص الحافز (على سبيل المثال أخلاقيات العمل، الالتزام بالمواعيد، والمظهر والأخلاق)**
- ☐ Lack of working world/life experience or maturity (including general knowledge) **نقص التجربة الحياتية أو النضج**
- ☐ None of the above
- ☐ Other (Please specify) _____

49. ARE YOU HIRING NOW? (SELECT ONE OPTION)

- ☐ Yes
- ☐ No

50. IF YES, PLEASE SPECIFY THE NUMBER OF JOB OPENINGS

Number

51. ARE YOU FACING CHALLENGES IN FILLING ANY OF THE ABOVE MENTIONED VACANCIES? (SELECT ONE OPTION)

- ☐ Yes
- ☐ No

52. PLEASE INDICATE THE REASONS WHY THEY ARE HARD TO FILL

- ☐ Too much competition from other employers الكثير من المنافسة من أصحاب عمل آخرين
- ☐ Not enough people interested in doing this type of work لا يوجد عدد كبير من الافراد الراغبين بالقيام بهذا النوع من العمل
- ☐ Jobseekers are not satisfied with the job terms and conditions (Salary, schedule, etc.) الباحثون عن عمل غير راضون عن شروط العمل
- ☐ Small number of applicants with the required skills عدد قليل من المتقدمين من ذوي المهارات المطلوبة
- ☐ Small number of applicants with the required attitude, motivation or personality عدد قليل من المتقدمين يتمتعون بالشخصية المطلوبة
- ☐ Small number of applicants generally عدد قليل من المتقدمين بصفة عامة
- ☐ Work experience doesn't match the enterprise's needs الخبرة العملية لا تطابق احتياجات المؤسسة
- ☐ Qualifications don't match the enterprise's needs المؤهلات لا تطابق احتياجات المؤسسة
- ☐ Weak Career Promotion/lack of prospects ضعف الترويج الوظيفي / عدم وجود آفاق وظيفية
- ☐ Difficult work shifts/Late hours or weekends دوامات العمل صعبة \ ساعة متأخرة أو خلال عطلة نهاية الأسبوع
- ☐ Short-term contract/contractual/Seasonal/Project etc عقد قصير الأجل \ تعاقدية \ موسمية \ مشروع \ الخ
- ☐ Remote location/Lack of public transportation بعد المكان / عدم وجود وسائل النقل العام
- ☐ Other (Please specify) _____

In case the applicants were lacking skills for any of the occupancies, please indicate which of the following skills were lacking: (Please use the same order of positions previously used)
ففي حالة افتقار المتقدمين إلى المهارات المطلوبة، يرجى الإشارة إلى أي من المهارات التالية تفتقر. اجمع السؤالين
-91 90

53. ALL POSITIONS

- (a) Management (Select one option. الادارة، أخلاقيات العمل، التوصيفات الوظيفية الموارد البشرية، السياسات والإجراءات)
- (b) Marketing – Low quality of product/service التسويق، جودة المنتج / الخدمة، الإعلان، التعبئة والتغليف، التسعير

(c) Finance and accounting (Select one option)

الإدارة المالية – التقارير المالية، النظام المحاسبي، إدارة الميزانية، ضعف إدارة التدفقات النقدية

(d) Operations (Select one option)

العمليات، نوعية المعدات، خدمات الصيانة، عملية الإنتاج، استخدام التكنولوجيا

(e) Other (Select one option)

54. SPECIFY

(a) Management

(b) Marketing

(c) Finance and accounting

(d) Operations

(e) Other (shall we add technical? Or we can say operations?)

55. PLEASE INDICATE HOW THESE STILL AVAILABLE VACANCIES ARE AFFECTING THE ENTERPRISE

(a) Lost business or purchases to competitors

(Select one option) فقدان الفرص

☐ Yes

☐ No

(b) Delay to the development of new products or services (Select one option) تأخير تطوير منتجات أو

خدمات جديدة

☐ Yes

☐ No

(c) Have difficulties meeting quality standards (Select one option) صعوبات تلبية معايير الجودة

☐ Yes

☐ No

(d) Experience increased operating costs (Select one option) زادت خبرة تكاليف التشغيل

☐ Yes

☐ No

(e) Have difficulties introducing new working practices (Select one option)
صعوبات تطبيق ممارسات عمل جديدة

- ☐ Yes
☐ No

(f) Increase workload for other staff (Select one option) الحاليين زيادة عبء العمل على الموظفين

- ☐ Yes
☐ No

(g) Outsource work or staff (Select one option) الاستعانة بعمال من خارج الشركة

- ☐ Yes
☐ No

(h) Withdraw from competing in the market (offering products and\or services) (Select one option)
الانسحاب من المنافسة في السوق

- ☐ Yes
☐ No

(i) Have difficulties meeting customer services objectives (Select one option) صعوبات تحقيق أهداف خدمة العملاء

- ☐ Yes
☐ No

(j) Have difficulties introducing technological change (Select one option) صعوبات إدخال التغيير التكنولوجي

- ☐ Yes
☐ No

(k) None of the above (Select one option)

- ☐ Yes
☐ No

Are you willing to hire people from the Syrian nationality or interns?

56. ARE YOU WILLING TO HIRE

(a) People from the Syrian Nationality (Select one option)

(b) Interns (Select one option)

In your opinion, Syrian employees are:

57. IN YOUR OPINION, SYRIAN EMPLOYEES ARE:

(a) Reliable employees (Select one option)

(b) Unreliable employees (Select one option)

58. FOR THE SAME POSITION: A PERSON FROM THE SYRIAN NATIONALITY WITH THE SAME QUALIFICATIONS AND SKILLS AS A LEBANESE PERSON SHOULD BE PAID: (SELECT ONE OPTION)

- ☐ More than the Lebanese
- ☐ Less than the Lebanese
- ☐ Equal to the Lebanese

59. BASED ON YOUR EXPERIENCE, PLEASE INDICATE THE THREE MOST IMPORTANT FACTORS TO CONSIDER WHEN RECRUITING A NEW EMPLOYEE: [PLEASE SELECT AT MOST THREE OPTIONS.] يرجى الإشارة إلى 3 أهم عوامل يجب مراعاتها عند تعيين موظف جديد

- ☐ Age العمر
- ☐ Level of education مستوى التعليم
- ☐ Skill set مجموعة المهارات
- ☐ Gender النوع الجنس
- ☐ Previous training التدريب السابق
- ☐ Professional experience الخبرة المهنية
- ☐ Requested salary الراتب المطلوب
- ☐ Country of origin بلد المنشأ
- ☐ Personal connection العلاقات الشخصية
- ☐ Honesty/Trustworthiness الصدق \ الجدارة بالثقة
- ☐ Other (Please specify) _____

60. LAST YEAR, DID YOUR EMPLOYEES PARTICIPATE IN ANY EXTERNAL OR INTERNAL TRAINING COURSES, COMPLETELY OR PARTIALLY FINANCED BY THE ENTERPRISE?

- ☐ Yes: internal
- ☐ Yes: External
- ☐ No

61. WHAT WERE THE MAIN CHALLENGES YOU FACED IN THE TRAINING?/REASONS BEHIND THE ABSENCE OF TRAINING?

- ☐ No or poor information on courses/trainers غيباب أو ضعف المعلومات عن الدورات / المدربين
- ☐ No or lack of courses/trainers available غيباب أو ضعف الدورات
- ☐ Low quality of courses on offer/low quality of trainers انعدام مستوى الدورات / المدربين
- ☐ Lack of Budget غيباب الميزانية
- ☐ Interviewee does not feel it is important to give this training (Absence of capacity-building culture غيباب ثقافة بناء القدرات)

Other (Please specify) _____

62. WHAT ARE THE TRAINING TOPICS THAT YOUR ENTERPRISE IS IN NEED OF TODAY?

Answer questions 102 and 103 simultaneously.

(a) Management (Select one option)

- ☐ Yes
- ☐ No

(b) Marketing (Select one option)

- ☐ Yes
- ☐ No

(c) Finance and Accounting (Select one option)

- ☐ Yes
- ☐ No

(d) Operations (Select one option)

- ☐ Yes
- ☐ No

(e) Other (Select one option)

- ☐ Yes
- ☐ No

63. FOR EACH OF THE AREAS SPECIFIED ABOVE, PLEASE SPECIFY THE TRAINING TOPIC:

- (a) Management
- (b) Marketing
- (c) Finance and accounting
- (d) Operations
- (e) Other

64. DOES YOUR COMPANY PLAN ON INTRODUCING NEW PRODUCTS, SERVICES, TECHNOLOGIES OR EXPAND/SWITCH TO NEW MARKETS? (SELECT ONE OPTION)

- ☐ Yes
- ☐ No

If yes, does your company plan to apply any of the following measures to address newly emerging tasks?

65. DOES YOUR COMPANY PLAN TO APPLY ANY OF THE FOLLOWING MEASURES TO ADDRESS NEWLY EMERGING TASKS?

- (a) Training of available staff (Select one option)
- (b) Internal reorganization to better use available staff and competencies (Select one option)
- (c) Recruitment of new staff (Select one option)

66. ARE THERE ANY BUSINESS DEVELOPMENT ENTITIES IN YOUR AREA? (INCUBATORS, CONSULTING FIRMS, TRAINING, RECRUITMENT AGENCIES, ASSOCIATIONS, SUPPORT PROGRAMMES...) (SELECT ONE OPTION)

- ☐ Yes
- ☐ No

67. IF YES, HAVE YOU EVER USED ANY OF THEIR SERVICES?

- (a) Yes (Please specify the service)
- (b) No (Why)

68. PLEASE NAME FIVE ENTITIES THAT YOU THINK CAN HELP YOU DEVELOP YOUR BUSINESS, IF ANY:

(a)

(b)

(c)

(d)

(e)

69. OTHER OBSERVATIONS OR COMMENTS:

ASK THE INTERVIEWEE IF HE/SHE HAS ANY QUESTIONS AND THANK HIM/HER FOR THE INFORMATION. TELL HIM/HER THAT WE MAY REACH OUT THEM SOON FOR OPPORTUNITIES FOR COLLABORATION.

THANK YOU VERY MUCH FOR TAKING YOUR TIME TO ANSWER ALL THE QUESTIONS!

ANNEX 5: STUDY'S TERMS OF REFERENCE

SKILL GAP ANALYSIS TERMS OF REFERENCE

BACKGROUND

With the support of the Madad Trust Fund, and under the Regional Resilience and Livelihoods Programme for Syrian refugees and host communities, the LEADERS Consortium (composed of ACTED, Danish Refugee Council, CARE, Oxfam and Save the Children) aims to contribute to the economic self-reliance, resilience and social stability of displacement-affected populations in Jordan and Lebanon as prioritized by the Regional Refugee and Resilience Plan (3RP). The Programme aims at working towards enhancing economic stability of all displaced and displacement-affected populations. The intervention targets 250,000 individuals in Jordan and Lebanon, including:

- Economically vulnerable individuals and households (particular focus on women and youth);
 - Existing and scalable private sector enterprises (MSMEs), and private sector associations;
 - Marginalized Syrian refugees;
 - Municipalities/Cadastres in the most displacement-affected areas hosting refugees.
- Specific objectives include:
- Improved access to sustainable livelihoods opportunities benefitting vulnerable households and individuals, particularly youth and women;
 - Improved economic enabling environment and service delivery in communities hosting refugees.

SCOPE OF WORK

The research will aim to identify the current competency needs identified by the private sector as in-demand skills (especially among the small and medium enterprises) within the labour market for business sectors, which indicate growth potential.

The resulting findings will also provide an overview of the experience and education desired by private sector companies showing absorptive capacity for employment and the employability patterns preferred by the private sector, including contract duration, typology of contracts, provision of benefits (payment into the NSSF, leave allowance), employment policies, gender ratios (including incentives in place for youth employment schemes), salary scales, links with employment offices, NGOs, local authorities (job referral system), barriers to engage with jobseekers with the right skill set and others as identified during the course of the research.

The analysis will also identify current patterns of engagement of the Lebanese and non-Lebanese workforce. Though the central focus of this research will not be an investigation of the existing correlation between informality/formality and exploitations patterns, complementary data is expected to be collected in this regard to inform a wider analysis under the overall Madad intervention.

GENDER AND YOUTH CONSIDERATIONS

In alignment with the targeted approach adopted under the programme, the methodology to be developed for such research, by the selected consultant, and the undertaking of the research, will adopt a gender-lens and youth-focus, taking into consideration factors of relevance to understanding the incentive structure around men's and women's engagement in the labour market, the division of skills and the constraints for women and men to meet those required skills, and the untapped opportunities available to the young labour force.

The resulting findings and recommendations will feed into the intervention partners' determination of the required actions under the employability component, thus including (a) training curricula development; (b) vocational training; (c) job matching; and (d) apprenticeships.

GEOGRAPHIC FOCUS

Given the potential movement constraints of intervention beneficiaries among the Syrian refugees, the geographic focus of the research will comprise: (a) Tripoli city in the Tripoli district; and (b) Mount Lebanon – four cadastres (indicatively in Jdaidet El-Matn, Baouchriyeh, Dekouaneh and Bourj Hammoud) in Metn district.

THE RESEARCH WILL ENCOMPASS:

- Desk review of secondary data;
- Primary data collection in the above-mentioned geographic focus areas;
- Analysis and validation;
- Consolidated research report.

Consortium members will be requested to share relevant documents, information and contacts to facilitate the research. In addition, key stakeholders such as the Chamber of Commerce, local economic development agencies, municipalities and unions etc. will be strongly engaged throughout the research.

DELIVERABLES

- Mapping of the enterprises, and their characteristics, present in the target areas;
- Mapping of the actors that provide vocation training;
- Analytical report detailing the:
 - Business support services required to nurture growth at enterprises level;
 - Skills gaps required for human capital strengthening of such enterprises;
 - Barriers (related to skills, legal framework, cultural practices, etc.) for the private sector to engage with jobseekers;
- Preliminary indicative training curricula development to inform the vocational training component of the wider intervention.

RESEARCH OUTPUTS

- Methodological approach and tools for approval;
- Action plan for the consultancy with timeline for approval;
- Briefing meetings (with the Consortium Technical Management Unit, TMU) to present preliminary findings;
- Preliminary findings report;
- Draft research report submitted to the Consortium TMU;
- Final research report consolidating feedback and comments provided by the TMU Consortium;
- Final presentation of report and findings.

TIMEFRAME

The consultancy will last approximately 30 days.
Date of initiation: as soon as possible.

ANNEX 6: SAMPLING METHODOLOGY

PHASE 1 – SETTING THE SAMPLING FRAME OBJECTIVES

- Understanding the labour market and skills gaps context
- Identifying priority sectors following the below criteria:

Sectors that hire the most unskilled and semi-skilled labour (in need of vocational training).

Sectors in which SMEs are currently experiencing revenue growth.

Sectors which are the most prevalent within the regions in terms of SME presence.

- Specifying criteria for the SME sample selected for the analysis, based on data collected from various sources.

APPLICATION

- Desk review: The research team tracked all statistical figures related to the Lebanese labour market, SME activity, economic growth per sector, distribution of local firms by sector, etc. Additionally, the study used qualitative data from previous studies to specify the criteria for focus.

OUTCOME

From the desk review:

1. The distribution of labour per sector per region:

The data available for the distribution of labour sector is available at the national level for the years 1997, 2004 and 2010. It shows the ranking of sectors per labour distribution as follows: services sector ranks first and employs 39–53% of the labour force (increasing trend over the years), commerce ranks second and employs 22% of the labour force in the years 1997 and

2004, and 27% in 2010. Industry comes in third position as it employed 12–15% of the labour force. Construction and agriculture follow in fourth and fifth place respectively. The trend has remained the same throughout this period.

The data for the distribution of labour per sector and region is only available for the years 1997, 2004 and 2010. However, since the trend and distribution for the national level has remained the same across the three selected years (1997 through 2010), we can assume that the trend for the regional level data has also remained the same until now.

Data regarding the involvement of Syrian refugees in the labour market includes the recent decree issued by the Ministry of Labour allowing Syrians to work in the three sectors of construction, agriculture and services (specifically: cleaning works). It is legally possible for Syrians to obtain work permits for those three sectors on the condition of rescinding their refugee status.

Due to deficiencies in the policies and regulations of the labour sector and the mismanagement of the crisis resulting from Syrian refugee influx, significant unfair job competition is occurring in the informal sector.

The government continues to play a weak or non-existing role in supervising wages, working conditions, investment and economic cycles.

Instead, local business tycoons or owners of SMEs keep employees and jobseekers at the mercy of their prospective employer.

The informal sector and informal unemployment existed at high levels in Lebanon even before the crisis. Figures dating back to 2009 show that the informality rates reached around 90, 80, 60, 40 and 15% for the agriculture, construction, commerce, industry and services, respectively.

The distribution of Syrian refugees working in the informal sector shows the biggest concentration of Syrian labour in the fields of services and agriculture.

2. The growth of different sectors in Lebanon
World Bank data on the contribution of different sectors to overall growth suggests that the sectors that contribute the most to total growth in Lebanon are the services sector, followed by commerce, industry and agriculture.

3. The distribution of firms per sector
The data available on the distribution of SMEs in the country suggests that commerce sector SMEs constitute 53% of the total number of SMEs.

Industry forms the second biggest proportion of SMEs, representing 12% of the total. The portions of SMEs related to construction and services do not exceed 5% each.

- Quota-based sampling frame:

The type of available quantitative data that can be used to identify the sampling frame consists of cross-sector percentages. This lends itself to the framing of the non-probability sample of firms using quota sampling. This sampling technique consists of specifying quotas for the sample categories. In the case of this labour market assessment, the quotas should involve sector quotas based on cross-sector labour force distribution rates.

PHASE 2 – SELECTING THE SAMPLE

OBJECTIVES

- Analysing the data
- Specifying the sector quotas (sampling frame)
- Specifying the firms based on the sector quotas

APPLICATION

- Random subselection:
Even though the sample selection followed the limitation of specific quotas, the firms chosen to fill those quotas were selected randomly in order to ensure the representation of different firm types and sizes. The only exceptions to

this random selection are the micro firms that consist of fewer than seven workers. The reason to exclude those firms is that they are not in line with the initial criterion that firms should have the potential to grow and recruit additional labour. The assumption here is that micro firms are usually less well-established businesses

that are often unable to expand. Some firms with

fewer than seven employees were included in the sample once they demonstrated the potential to hire more labour, and/or if they seasonally hired employees that would bring the total number of employees up to more than ten.

OUTCOME

Selected sample of 71 firms based on sector quotas in Mount Lebanon

ANNEX 7: LIST OF SMES

Name	Sector	Mouhafaza	Area	Phone
houbeika enter-prise	Manufacturing and Wholesale	Bekaa	Zahleh	08/930730
Tanmia S.A.L	Wholesale and Retail	Baalbak ElHermel	Ablah	08/901800
M.S Ahmad dirany & Bros factory SAL	Wholesale and Retail	Baalbak ElHermel	Kasarnaba	08/911400
Zaarour Tires Co.	Wholesale and Retail	Bekaa	Taanayel	08/514244
Shaeem al Jabali for plastics	Manufacturing	Bekaa	Rayak	03/644360
Progress SAL	Wholesale and Retail	Baalbak ElHermel	Tamnin tahta	03/973388
Toufaha bakery	Manufacturing	Bekaa	Ferzol	08/807111
Hammouds Trading EST	Construction	Bekaa	Bar Elias	08/511086
Kaa El Rim Cartoon Company	Manufacturing	Bekaa	Kaa El Rim	08/806352
GECECO General Ceramic Co. S.A.L	Construction	Bekaa	Taanayel	08/542036
Najjar Foods L.L.C	Manufacturing, Wholesale and Agriculture	Bekaa	Jdita	08/540333
Sabbouri Co. S.A.R.L – Interior and exterior contracting	Services and Wholesale	Bekaa	Chtaura	08/540742
Mazaj Restaurant	Services and Repair	Bekaa	Zahle	03/343425
Chtaura Park Hotel	Services and Repair	Bekaa	Zahle	08/542011
Wooden Bakery	Services and Repair	Bekaa	Zahle	08/807100
SICOMO	Manufacturing	Bekaa	Kob Elias	08/500550
Jaber Sweets	Manufacturing	Bekaa	Bar Elias	08/514338
Cafe Najjar	Services and Repair	Bekaa	Zahle	76/016223
Charisma Ceramic Co.	Manufacturing	Bekaa	Masnaa	08/621000
Integrated Paving Contracting Company	Manufacturing and Construction	Bekaa	Chtaura	08/544154
Massabki Hotel	Services and Repair	Bekaa	Chtaura	08/544644
Monte Alberto Hotel and Restaurant	Services and Repair	Bekaa	Zahle	08/810912

AL Radwan company	Wholesale and Retail	Bekaa	Saadnayel	08/506222
Amarco. co	Construction	Bekaa	Majdal Anjar	08/621034
Diwan Al Hellani	Services and Repair	Baalbak ElHermel	Baalbak	08/373882
Fertiland	Agriculture and Wholesale	Bekaa	Ferzol	08/950 674
Akil bros	Wholesale and Retail	Baalbak ElHermel	Baalbak - Ras el Ein	08/370747
Al Rihab Resorts	Services and Repair	Bekaa	Karak	08/931532
Mrad Flowers	Agriculture and Wholesale	Bekaa	Taanayel	08/510208
Al rawabi	Services and Repair	Baalbak ElHermel	Baalbak	08/371666
MBM	Manufacturing	Bekaa	Zahle	01/510 976
Massabki Laiterie	Manufacturing	Bekaa	Jdita	08/540281
aser w helwayat al joubbi	Manufacturing	Baalbak ElHermel	Baalbak	76/488501.
MES. Industrial & Commercial Est.	Services, Wholesale and Manufacturing	Bekaa	Terbol	08/955055
Milky way/ Maza-re3 Chtoura	Manufacturing	Bekaa	Qaa El Reem	03/801201
United Business Corporation (owners of Stargate and Hollywood Cafe)	Services and Repair	Bekaa	Zahle	08/811735
Domaine de Taanayel	Services, Manufacturing and Agriculture	Bekaa	Taanayel	08/540066
Laiterie du couvent de Taanayel	Manufacturing	Bekaa	Taanayel	08/540066
Greens Restaurant	Services and Repair	Bekaa	Chtaura	03/301504
Kassatly Chtaura	Manufacturing	Bekaa	Chtaura	08/543500
Al Ghayth institute for general trading	Agriculture and Manufacturing	Bekaa	Karak	71/833300
Zahrat Loubnan Restaurant	Services and Repair	Baalbak ElHermel	Baalbak - Ras el Ein	03/445372
La Tour Bread and Bakery	Services and Repair	Bekaa	Zahle	08/805900
Relax furniture	Manufacturing and Wholesale	Baalbak ElHermel	Labwe	08/230101
Al Mahatta Restaurant	Services and Repair	Bekaa	Chtaura	70/694791

Saliba Wheat Mill (Mata7en Saliba)	Wholesale and Retail	Bekaa	Ferzol	08/812731
Ghazale General Trading	Wholesale and Retail	Bekaa	Chtaura	08/542437
burning sun (al shams al Mou7rika)	Manufacturing	Bekaa	Ali Nahri	08/901642
Salloum Bothers Company	Wholesale and Retail	Bekaa	Bar Elias	08/511350
baalbak enterprise for construction	Manufacturing	Baalbak ElHermel	Baalbak	08/379979
Ras Baalbak Restaurant	Services and Repair	Baalbak ElHermel	Ras Baalbak	08/210189
Lebanese institute for agricultural and industrial projects	Manufacturing and Wholesale	Baalbak ElHermel	Tamnin	08/900505
Mourad Factory for Marble & Granite	Manufacturing	Baalbak ElHermel	Talia	70/340345
Michel rent a car	Services and Repair	Bekaa	Zahle	08/931437
Waked Electric S.A.R.L	Wholesale and Retail	Bekaa	Taanayel	08/540481
Liban Cave Winery	Manufacturing	Bekaa	Zahle	08/930700
ORCA S.A.R.L	Wholesale and Retail	Bekaa	Saadnayel	08/505240
STC ceramics	Manufacturing	Baalbak ElHermel	Baalbak	76/788815
motel rana	Services and Repair	Bekaa	Ablah	08/950111
Green paradise	Services and Repair	Baalbak ElHermel	Baalbak	08/372705
Mokhtar Carpet	Manufacturing and Construction	Baalbak ElHermel	Baalbak	70/259666
Best Aluminium	Manufacturing and Wholesale	Bekaa	Zahle	08/931920
Chalhoub Press	Services, and Manufacturing	Baalbak ElHermel	Tamnin Tahta	08/900008
Taanayel General hospital	Services and Repair	Bekaa	Taanayel	08/545100
Beqaa Center For Services	Services and Repair	Bekaa	Karak	08/800108
Al Ahed for oils and repair	Services and Repair	Baalbak ElHermel	Chmestar	03/933832
lakkis farms	Manufacturing	Baalbak ElHermel	Baalbak	03/022212
Somoplast	Manufacturing	Bekaa	Zahle	08/930720
Skaff dairy farm	Manufacturing	Bekaa	Zahle	08/506951

ETS Lawandos	Services and Wholesale	Bekaa	Zahle	08/820669
domaine des tourelle	Manufacturing	Bekaa	chtaura	08/540114
mashtal samaha	Agriculture	Bekaa	Chtaura	08/546646
Tamnin general Hospital	Services and Repair	Baalbak ElHermel	Tamnin Tahta	08/912343
ETS Al Aman (Am-haz Brothers)	Services, and Manufacturing	Baalbak ElHermel	Baalbak	03/615030
Razmik fishery	Services and Agriculture	Bekaa	Anjar	08/620822
Beqaa Chicken (Farrouj Al Bikaa)	Agriculture and Wholesale	Baalbak ElHermel	Makne	08/305908
houbeika enterprise	Manufacturing and Wholesale	Bekaa	Zahle	08/93073
Computop	Services and Wholesale	Bekaa	Zahle	08/931939
Chreif Restaurant	Services and Repair	Baalbak ElHermel	Labwe	08/230800
z Burger House	Services and Repair	Bekaa	Zahle	08/809209
Lebanese company for natural mineral water	Manufacturing and Wholesale	Baalbak ElHermel	Hermel	08/201318
Solitaire	Manufacturing	Bekaa	Zahle	08/506908
chalalat anjar	Services and Agriculture	Bekaa	Anjar	08/620753
Hawi group	Agriculture	Bekaa	Zahle	03/316605.
Arab Company for tourism and Investment	Services and Repair	North Lebanon	Sir Donnieh	03/999015.
Akram Hajji and Brothers	Services and Repair	North Lebanon	Menieh	03/247194
mostafa al nelawi for agriculture	Agriculture	North Lebanon	Menieh	03/256357
connexion	Services and Repair	North Lebanon	Tripoli	06/626969 - 06/424933
beez house	Wholesale and Retail	North Lebanon	Tripoli	70/119319
Lebanese Industrial Kingdom	Manufacturing	North Lebanon	Al Baddawi	06/384389
tlais company	Wholesale and Retail	North Lebanon	Tripoli	06/442 802
Dar el Qamar	Services and Repair	North Lebanon	Damm w Farez	06/412359
Al Moustakbal Trading	Agriculture and Wholesale	North Lebanon	Qobbeh	06/412696

Coop Supermarket	Wholesale and Retail	North Lebanon	Tripoli - Maarad	06/442522
Spiral resto-cafe	Services and Repair	North Lebanon	Damm w Farez	06/412050
Mini Car Food	Wholesale and Retail	North Lebanon	Tripoli	06/444170
Apec	Wholesale and Retail	North Lebanon	Al Baddawi	06/384858
Tic Tuck	Services and Repair	North Lebanon	Mina	06/204337
Hoz Market (first branch)	Wholesale and Retail	North Lebanon	Abi Samra	06/444264
North Haven Club	Services and Repair	North Lebanon	Qalamoun	06/400770
Breakfast 2 Breakfast (B2B)	Services and Repair	North Lebanon	Damm w Farez	06/412333
Mou2asaset omar salem ettijariya	Wholesale and Retail	North Lebanon	Qalamoun	03/522537
Dar el chimal	Wholesale and Retail	North Lebanon	Tripoli	06/411 611
Tripoli Home	Wholesale and Retail	North Lebanon	Tripoli	06/409654
Green Lebanon Bakery	Manufacturing and Wholesale	North Lebanon	Tripoli	06/210911
crystal boutique	Wholesale and Retail	North Lebanon	Tripoli	06/202060
dawke ekhwan	Manufacturing	North Lebanon	Qobbeh	71/229479
Hateco	Services and Wholesale	North Lebanon	Mina	06/223666
baytona	Services and Repair	North Lebanon	Damm w Farez	06/201414
Tripoli Park	Services and Repair	North Lebanon	Abi Samra	78/942035
Hawa chicken	Manufacturing, Wholesale and Agriculture	North Lebanon	Mina	06/214300
telefric sir	Services and Repair	North Lebanon	Sir Donnieh	03/999015
smartsecurity	Services and Wholesale	North Lebanon	Tripoli	06/432610
al sharika al lob-naniya lel ta3ahodat	Construction	North Lebanon	Sir Donnieh	06/601595
Amig Co.s.a.r.l	Wholesale and Retail	North Lebanon	Tripoli	06/600704

korne sawda lel miyah al ma3dani-ye	Wholesale and Retail	North Lebanon	Sir Donnieh	06/601595
Ahmad Awad el Masri company	Agriculture and Wholesale	North Lebanon	Tripoli	06/380859
Primola	Manufacturing and Wholesale	North Lebanon	Tripoli	06/442196
sombrero	Manufacturing and Wholesale	North Lebanon	Tripoli	06/411945
Izzat Al Daouk	Wholesale and Retail	North Lebanon	Tripoli	06/214500
Refaat Hallab	Services, Wholesale and Manufacturing	North Lebanon	Tripoli	06/444411
Chafia	Wholesale and Retail	North Lebanon	Maarad	06/443344
JADWA	Construction	North Lebanon	Qalamoun	06/401777
Hicham Ghanem Wa Shoraka2ouh	Wholesale and Retail	North Lebanon	Tripoli	06/423557
Lebda l Tijara w Ma7roukat	Services and Repair	North Lebanon	Mina	06/600573
Khoury Home	Wholesale and Retail	North Lebanon	Mina	70/257959
Sharikat Nazih Ajaja w Awladeh Al Tijariya	Services and Repair	North Lebanon	Tripoli	03/577562
Bassam Sadek Trade	Wholesale and Retail	North Lebanon	Tripoli	03/224111
Diab LED Company	Services, Wholesale and Manufacturing	North Lebanon	Qobbeh	06/430735
al sharika al mum-laka al lubnaniya	Manufacturing	North Lebanon	Al Baddawi	06/384389
Family Conserve	Manufacturing	North Lebanon	Qalamoun	03960418
Mou2asaat samir basam jamal	Wholesale and Retail	North Lebanon	Tripoli	06/409520
Code And Dote	Services and Repair	North Lebanon	Tripoli	06/424266
Mohama Ajam and Sons	Services and Repair	North Lebanon	Maarad	06/445860
NG Company	Manufacturing and Wholesale	North Lebanon	Al Baddawi	06/383531 06/383532
Zaytouneh	Manufacturing and Wholesale	North Lebanon	Mina	06/214848
Bella Flex	Manufacturing and Wholesale	North Lebanon	Mina	06/628628

al-Mahdi bakery	Services and Repair	North Lebanon	Abi Samra	06/438384
Tripoli Plaza (tripoli branch)	Wholesale and Retail	North Lebanon	Abi Samra	06/439666
BOUTIQUE WASSEF EL SAYED	Wholesale and Retail	North Lebanon	Tripoli	06/624526
Sea Café	Services and Repair	North Lebanon	Qalamoun	03/449753
Walid Salem For Gaz	Services and Repair	North Lebanon	Qalamoun	70/187957
Shay ou Assal	Services and Repair	North Lebanon	Tripoli	06/410674
Le Palme	Services and Repair	North Lebanon	Mina	06/217077
Al Nakheel	Services and Repair	North Lebanon	Mina	06/228777
Good Babies	Wholesale and Retail	North Lebanon	Maarad	71/687698
Aquaria	Services and Repair	North Lebanon	Mina	71144332
Centre ville	Wholesale and Retail	North Lebanon	Tripoli	70/050004
masna3 al-sab-sabi li sina3et al a7ziya (coax, brand name)	Manufacturing	North Lebanon	Abi Samra	03/003590
Baroody Group	Services, Wholesale and Manufacturing	Mount Lebanon	Mkalles	01/486395
Lawandos Establishment	Wholesale and Retail	Mount Lebanon	Bourj Hammoud	01/499718
Wooden Bakery	Services and Wholesale	Mount Lebanon	Bourj Hammoud	01/262286
Plasticom	Manufacturing	Mount Lebanon	Dekwaneh	01/687122
Mrad trading company	Services and Wholesale	Mount Lebanon	Bushrieh	01/902917
MES	Manufacturing and Wholesale	Mount Lebanon	Jdeideh	08/955009
Samra sanitary Somp	Construction	Mount Lebanon	Jdeideh	01/878907
	Manufacturing	Mount Lebanon	Bushrieh	01/886234
Via Larenta	Manufacturing and Wholesale	Mount Lebanon	Jdeideh	01/892790
Charbel Bassar Photography	Services and Repair	Mount Lebanon	Jdeideh	03/854314
Nassar Bookshop	Wholesale and Retail	Mount Lebanon	Jdeideh	01/902703

LENA Tours & Travel	Services and Repair	Mount Lebanon	Dekwaneh	01/496696
Antoine Youssef Kai For Trading	Services and Wholesale	Mount Lebanon	Bushrieh	01/564318
Nouvelle Librairie Raymond Sal	Wholesale and Retail	Mount Lebanon	Bushrieh	01/880250
Alfa Tools for Trading SARL	Construction	Mount Lebanon	Bourj Hammoud	01/243535
Total Bouchrieh 2	Services and Repair	Mount Lebanon	Bourj Hammoud	01/262462
Drugstore Al Fawares	Services and Repair	Mount Lebanon	Jdeideh	01/892288
Sroure Pharmacy	Services and Wholesale	Mount Lebanon	Jdeideh	01/889650
Chanaa Trading Company	Wholesale and Retail	Mount Lebanon	Dekwaneh	08/1302045
Elie Yammine for trading	Agriculture and Wholesale	Mount Lebanon	Dekwaneh	01/494799
Star for Services	Services and Repair	Mount Lebanon	Dekwaneh	01/699111
Abi Nader SARL	Services and Wholesale	Mount Lebanon	Bushrieh	01/878763
Autoshow Rent a Car	Services and Repair	Mount Lebanon	Dekwaneh	01/494966
Intertectra	Construction, Services, Wholesale	Mount Lebanon	Bushrieh	01/871586
SAGCO Pepinieres La Sagesse	Agriculture and Wholesale	Mount Lebanon	Jdeideh	03/327161
Matai	Wholesale and Retail	Mount Lebanon	Jdeideh	01/878881
Carole Murr Beauty Salon	Services and Repair	Mount Lebanon	Jdeideh	03/840244
Rebound	Services and Repair	Mount Lebanon	Jdeideh	01/899989
Eye Care	Services and Repair	Mount Lebanon	Jdeideh	03/845364
The Senator	Wholesale and Retail	Mount Lebanon	Jdeideh	01/892124
Rosa	Services and Agriculture	Mount Lebanon	Jdeideh	01/880199
axis	Construction, and Wholesale	Mount Lebanon	Jdeideh	01/879175
Z gorgeous	Services and Repair	Mount Lebanon	Jdeideh	03/904883
Dagher patisserie	Services and Repair	Mount Lebanon	Jdeideh	01/901521
Traboulsi trading	Construction	Mount Lebanon	Jdeideh	01/870287

Seulement pour toi	Agriculture	Mount Lebanon	Dekwaneh	71/181289
Elissa for sanitary and heating appliances S.A.L.	Construction, and Wholesale	Mount Lebanon	Dekwaneh	01/481981
Aoun & Haddad co.	Manufacturing, Wholesale and Construction	Mount Lebanon	Dekwaneh	01/502626
Blatt Haber	Manufacturing and Construction	Mount Lebanon	Dekwaneh	70/565659
Jewellery and technological Institute of Lebanon	Services and Wholesale	Mount Lebanon	Dekwaneh	03/849940
Rizk Travel	Services and Repair	Mount Lebanon	Dekwaneh	01/682074
Elco Group	Services, Wholesale and Manufacturing	Mount Lebanon	Dekwaneh	01/496585
Glassalco	Manufacturing, Wholesale and Construction	Mount Lebanon	Dekwaneh	01/499619
Universal Glass	Manufacturing and Wholesale	Mount Lebanon	Dekwaneh	01/684683
Amana Insurance	Services and Repair	Mount Lebanon	Dekwaneh	01/683025
Farah Trading Compnay	Wholesale and Retail	Mount Lebanon	Dekwaneh	01/488970
cat & mouth	Services and Repair	Mount Lebanon	Dekwaneh	01/424484
Srour for scrap metals	Services and Repair	Mount Lebanon	Dekwaneh	03/800131
Dany Rachel Establishment	Services and Repair	Mount Lebanon	Bourj Hammoud	01/241523
Oralec	Manufacturing and Wholesale	Mount Lebanon	Bourj Hammoud	03/586164
Nassif Group	Wholesale and Retail	Mount Lebanon	Bushrieh	01/877767
Ferik Steel	Manufacturing and Wholesale	Mount Lebanon	Bushrieh	01/684782
Snack Garo	Services and Repair	Mount Lebanon	Bourj Hammoud	01/251381
Adir Insurance (Adonis Insurance and Reinsurance)	Services and Repair	Mount Lebanon	Bushrieh	01/256290
Issa jewelry	Manufacturing and Wholesale	Mount Lebanon	Bushrieh	01/880728

Oncle Mich	Wholesale and Retail	Mount Lebanon	Bourj Hammoud	01/263191
Layous Meat Trading	Wholesale and Retail	Mount Lebanon	Bourj Hammoud	01/257798
Hagopian Shops	Services and Repair	Mount Lebanon	Bushrieh	01/261209
Amanos Bakery	Manufacturing and Wholesale	Mount Lebanon	Bourj Hammoud	01/250791
Purple My Harmony	Services and Repair	Mount Lebanon	Jdeideh	03/118507
RAK Paper & Board	Services, Wholesale and Manufacturing	Mount Lebanon	Bushrieh	01/694444
Rousse Trading Co.	Wholesale and Retail	Mount Lebanon	Dekwaneh	01/497617
Magic Home Trading Company	Wholesale and Retail	Mount Lebanon	Jdeideh	01/873838
Haddad Est. PLC	Construction, and Wholesale	Mount Lebanon	Bushrieh	01/885445
Coin Market	Wholesale and Retail	Mount Lebanon	Bourj Hammoud	01/24293
Star Taxi	Services and Repair	Mount Lebanon	Bourj Hammoud	01/25023
Brands for less	Wholesale and Retail	Mount Lebanon	Jdeideh	03/289893

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FUNDED BY THE EUROPEAN UNION
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