

COVID-19 and Youth Employment in Jordan and Palestine: Impacts, Opportunities, and a Way Forward



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Acronyms and Abbreviations

AFD	Agence Française de Développement
AMRTC	Abdali Mall Recruitment and Training Center
ANERA	American Near East Refugee Aid
BPO	Business process outsourcing
CBJ	Central Bank of Jordan
CBT	Cash-based transfers
COD	Cash-on-delivery
DFS	Digital financial services
EBRD	European Bank for Reconstruction and Development
ECE	Early childhood education
EFE	Education For Employment
EFE-Jordan	Education For Employment-Jordan
EFE-Palestine	Education For Employment-Palestine
EPP	Economic Priorities Program (Jordan)
E-TVET Strategy	Jordanian National Employment – Technical and Vocational Education and Training Strategy
EU	European Union
EUREP	European Union Representative Office in Jerusalem
F4J	Finance for Jobs Project
Fafo	Fafo Institute for Labour and Social Research
FAO	Food and Agriculture Organization of the United Nations
FDI	Foreign direct investment
FTA	Free trade agreement
GDP	Gross domestic product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit/German Federal Enterprise for International Cooperation
GoJ	Government of Jordan
HI	Humanity & Inclusion
HPC	Higher Population Council (Jordan)
HVAC	Heating, ventilation and air conditioning
ICT	Information and Communications Technology
IFAD	International Fund for Agricultural Development
IFC	International Finance Corporation
ILO	International Labour Organization
IMF	International Monetary Fund
IPR	Investment Programme for Resilience
IRENA	International Renewable Energy Agency
ISCO	International Standard Classifications of Occupations
JCI	Jordanian Chamber of Industry
JEGP	Jordan Economic Growth Plan
JIC	Jordan Investment Commission
JTP	Job Training and Placement Programming

KG1	Kindergarten Year 1
KG2	Kindergarten Year 2
MENA	Middle East and North Africa
MEMR	Ministry of Energy and Mineral Resources (Jordan)
MoA	Ministry of Agriculture
MoDEE	Ministry of Digital Economy and Entrepreneurship (Jordan)
MOE	Ministry of Education
MoEHE	Ministry of Education and Higher Education (Palestine)
MoH	Ministry of Health
MoICT	Ministry of Information and Communications Technology (Jordan)
MOL	Ministry of Labor
MONE	Ministry of National Economy (Palestine)
MoSD	Ministry of Social Development
MoTA	Ministry of Tourism and Antiquities
MSMEs	Micro, small and medium-sized enterprises
MTiT	Ministry of Telecom & Information Technology (Palestine)
NAF	National Aid Fund (Jordan)
NGO	Non-governmental organization
OECD	Organisation for Economic Co-Operation and Development
PA	Palestinian Authority
PCBS	Palestinian Central Bureau of Statistics
PFIU	Palestinian Food Industries Union
PIPA	Palestinian Investment Promotion Agency
PMA	Palestinian Monetary Authority
PPP	Public-private partnership
QIZ	Qualified Industrial Zone
SEO	Search engine optimization
SMEs	Small and medium-sized enterprises
SSC	Social Security Corporation (Jordan)
TVET	Technical and vocational education and training
UN	United Nations
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
UNIDO	United Nations Industrial Development Organization
UNRWA	United Nations Relief and Works Agency for Palestine Refugees in the Near East
USAID	United States Agency for International Development
VTI	Vocational Training Institute
WFP	World Food Programme
WHO	World Health Organization



Key Statistics

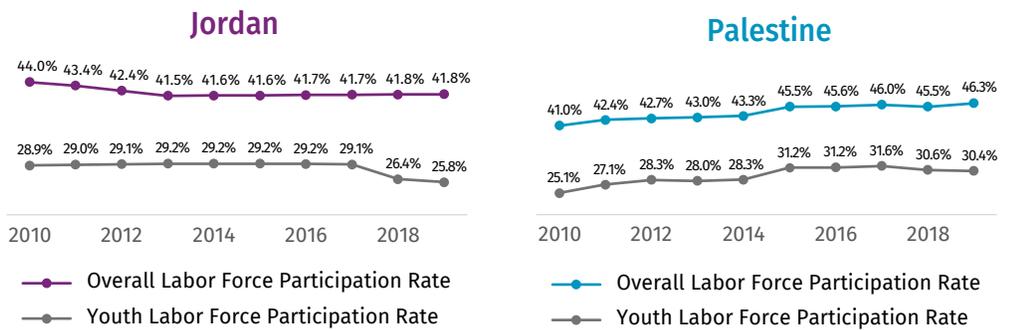
● Jordan ● Palestine

> 61%

Percent of the population in Jordan and Palestine are youth under 30

Percent of women who participate in the labor force

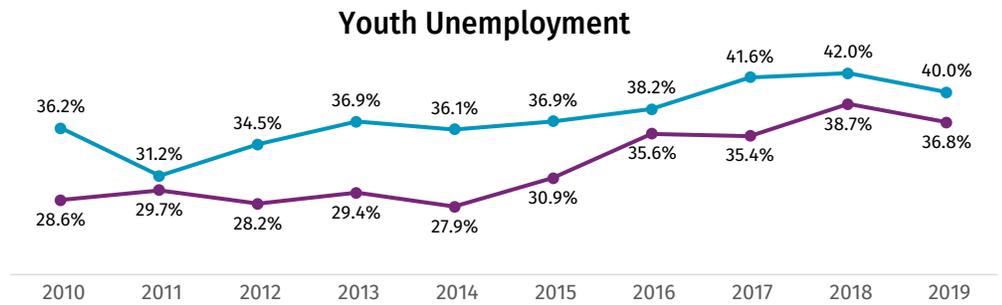
16% Jordan **19%** Palestine



In 2019

Youth unemployment in Jordan was **119% higher** than overall unemployment

Youth unemployment in Palestine was **58% higher** than overall unemployment



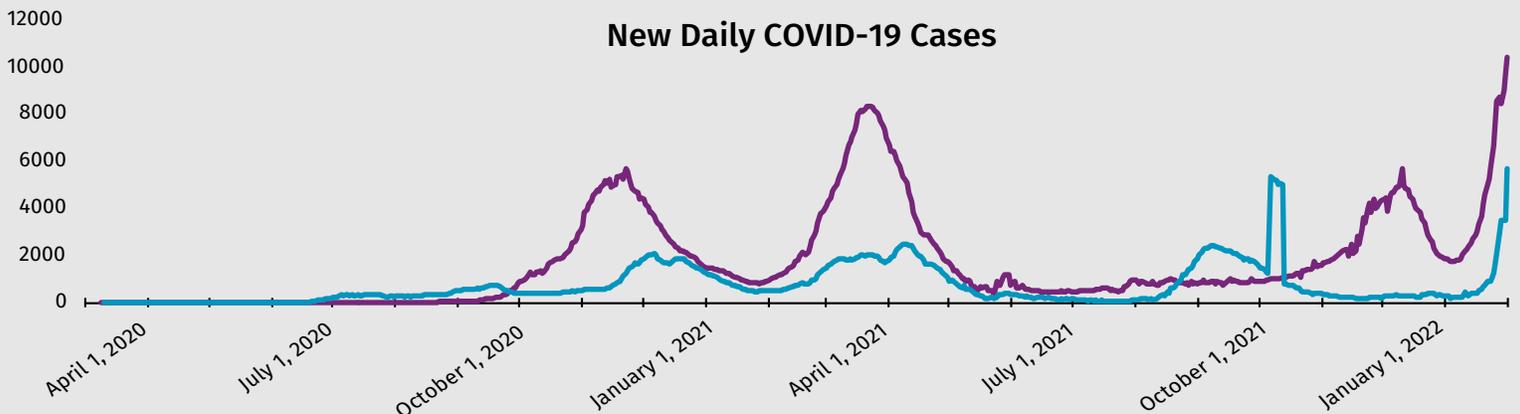
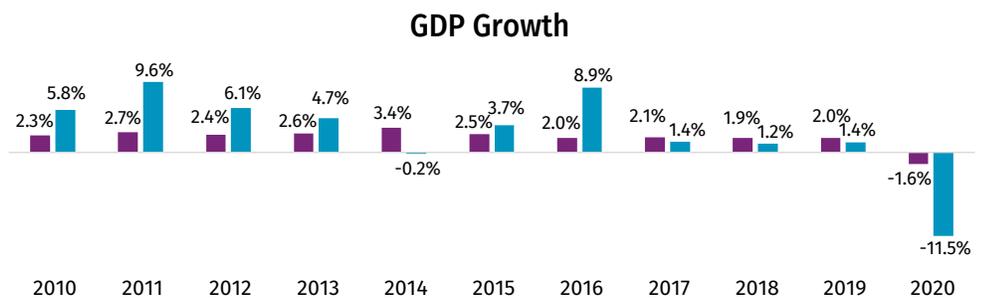
In 2020, global GDP shrank by

3.4%

due to the impacts of the coronavirus pandemic

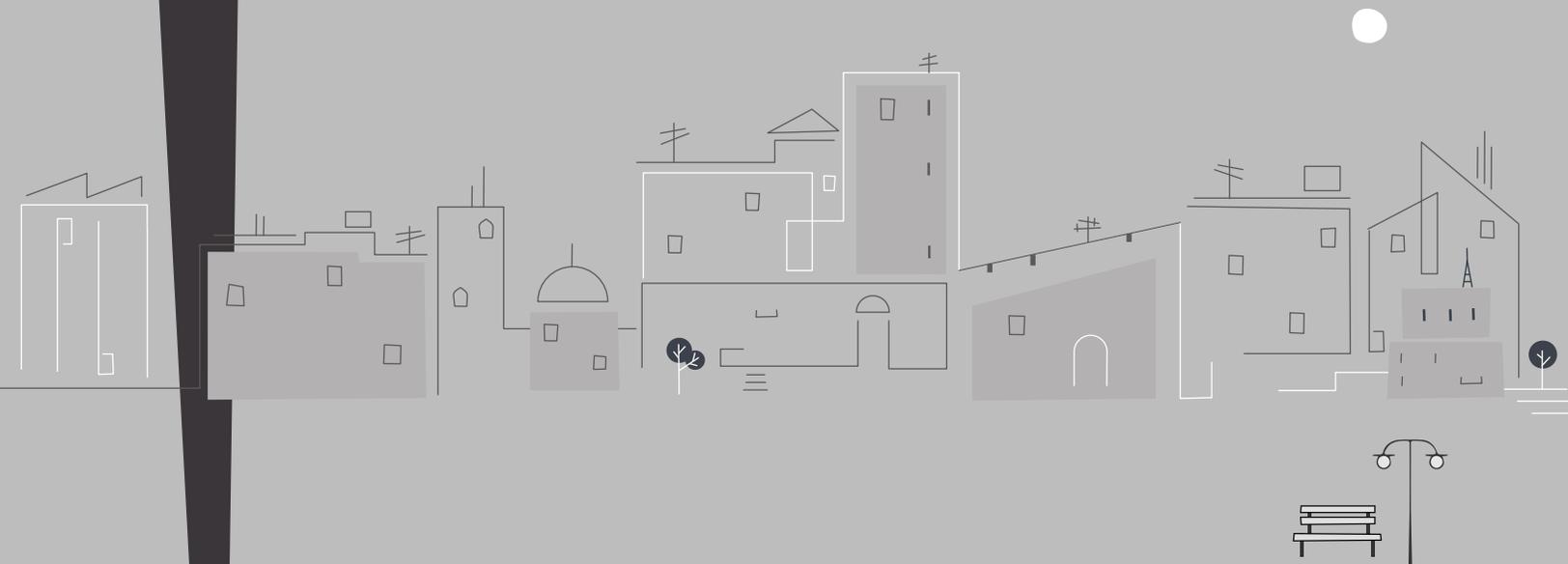
Jordan's GDP shrank by only **1.6%**

Palestine's GDP contracted by **more than 3 times the global average**



Note: Labor force participation and unemployment data are ILO modeled estimates. This data, as well as GDP figures, were collected from the World Bank World Development Indicators database. Population figures were collected from the World Bank Population Estimates and Projections database. COVID-19 daily case rates were collected from the COVID-19 Data Repository by the Center for Systems Science and Engineering (CSSE) at Johns Hopkins University.

Executive Summary





The COVID-19 pandemic drastically altered the daily lives of countless individuals across the globe, threatening their health and livelihoods and impacting businesses, supply chains, and government revenues. Jordan and Palestine were not spared from these effects, leading their governments and populations to struggle to gain footing as the resulting health and economic crises ensued. Young job seekers, particularly women, refugees, and youth with disabilities, have been disproportionately affected by the crisis through job losses and heightened barriers to entering the workforce.

The first confirmed case of COVID-19 in Jordan was detected on March 2, 2020. Just days later on March 5, the first confirmed case was detected in Palestine. Since this initial outbreak, nearly 1.5 million cases have been confirmed in Jordan, as have more than 600,000 in Palestine.¹ Despite early successes in limiting the spread of COVID-19, Jordan and Palestine faced significant waves of infections beginning in the latter part of 2020 and continue to grapple with an ever-changing landscape of new variants.

Following the initial outbreaks, the Government of Jordan (GoJ) and the Palestinian Authority (PA) reacted quickly to curb the spread of the virus, instituting movement restrictions, curfews, and limits on public gatherings that varied in severity. These critical measures implemented to protect public health led to shrinking private sector revenue and significant job losses, affecting vulnerable populations the most acutely. Both the GoJ and the PA made efforts to quickly respond to the resulting economic crisis, with varying levels of success.

Jordan and Palestine faced substantial challenges connecting youth to the workplace prior to the pandemic, with youth unemployment rates reaching 36.8% in Jordan and 40% in Palestine in 2019.²

The COVID-19 pandemic drastically altered the daily lives of countless individuals across the globe, threatening their health and livelihoods and impacting businesses, supply chains, and government revenues

During the COVID-19 economic recovery period, it will be critical to support the integration of youth, particularly the most vulnerable, into the labor market and prepare them with the needed skills and experience to seize new opportunities in the transformed global economy.

Efforts to integrate youth into the labor market may entail varying forms of training in fields ranging from vocational trades to ICT and virtual freelancing. They may also involve the provision of mentoring and job or apprenticeship placement services. Importantly, these efforts will require a focus on guiding youth toward opportunities in sectors most likely to grow during the COVID-19 recovery. Equipping youth with the competencies needed to adapt and demonstrate resilience in a rapidly evolving job market will greatly facilitate this process.

Initiatives aimed at integrating youth into the labor market during the COVID-19 recovery will also benefit from collective action among government, the private sector, and civil society to advance creative approaches to connect the most vulnerable youth with sustainable economic opportunities.



Study Overview

The aim of this study is to understand and document the impacts of the COVID-19 pandemic on young people in Jordan and Palestine, with an emphasis on vulnerable youth, and to utilize these findings to formulate concrete recommendations for youth workforce development programming implemented in both geographies during the COVID-19 recovery.

For the purposes of this study, vulnerable populations include refugees, women, persons with disabilities, and youth living in under-resourced locations such as rural areas and communities in Gaza. Women have been included in this definition of vulnerable populations due to the barriers they face to accessing employment beyond those felt by their male peers, in addition to their low labor force participation rates, which, in Jordan and Palestine, are among the lowest in the world.³

The study utilized a mixed methods approach that gathered perspectives from youth workforce development program graduates as well as employers in Jordan and Palestine via phone-based and online surveys. A total of 774 graduates of youth workforce development programming delivered in Jordan by Education For Employment-Jordan (EFE-Jordan) and in Palestine by Education For Employment-Palestine (EFE-Palestine) as well as 222 employers were surveyed in August and September 2021. The youth survey was delivered to a stratified random sample of youth whereas the employer survey was conducted using convenience sampling.ⁱ In addition, 31 subject matter experts and key stakeholders were consulted via interviews conducted over Zoom in September and October 2021.

Impacts of the Pandemic on Youth and Vulnerable Populations

The COVID-19 pandemic has exacted a significant toll on the health and economic wellbeing of youth and the wider population in both Jordan and Palestine. The following section provides a high-level overview of the GoJ and PA responses to the pandemic in order to place the subsequent discussions on the pandemic's economic impacts within the context of contemporaneous government policies intended to minimize those impacts. A review of the findings from the youth and employer surveys follows.

Government Pandemic Responses

Following the initial detection of COVID-19 in Jordan, the GoJ reacted swiftly to slow the spread of the virus. On March 17, King Abdullah signed a royal decree activating the National Defense Law, under which subsequent pandemic responses were enacted. The GoJ declared a state of emergency and instituted a complete lockdown and curfews.⁴ As part of this initial lockdown, the government closed air and land borders, educational institutions, non-essential public services, and all private businesses.⁵

Despite its early success in limiting the spread of COVID-19 as a result of strict lockdown measures, Jordan faced its first wave of infections between September 2020 and January 2021 following the gradual easing of restrictions in the summer of 2020. Following the initial outbreak, the GoJ issued a series of orders aimed at protecting public health and providing critical support to vulnerable populations, businesses, and employees in both the formal and informal sectors, utilizing

ⁱ EFE is a Network of Affiliated organizations that deliver workforce development programming for youth in the Middle East and North Africa (MENA). EFE-Jordan and EFE-Palestine have been working since 2006 to develop the essential, job search, and entrepreneurship skills of youth. The youth sample was stratified on gender, refugee status in the case of Jordan, and residence in the West Bank versus Gaza in the case of Palestine.



a broad set of policy mechanisms to respond to the crisis. Government approaches included the expansion of cash transfer programs, wage subsidies, unemployment insurance, prohibitions on terminating employees, advances on withdrawals from social security for some workers, the creation of an emergency fund to support vulnerable families, and others.⁶

In Palestine, the PA declared a state of emergency immediately following the detection of the first case of COVID-19 on March 5, 2020, and then instituted a lockdown on March 22, 2020. Measures included the closure of universities, schools, and non-essential facilities, movement restrictions between governorates in the West Bank, and a request for West Bank residents to remain at home for 14 days except for emergencies and essential activities, as well as others.⁷

The Palestinian government also released a COVID-19 response plan in late March 2020 that emphasized its commitment to responding proactively to the pandemic using evidence-based approaches. The immediate and significant response to the early cases of COVID-19 was effective in limiting transmission during the initial months of the pandemic. However, the first wave of infections began soon after restrictions were completely lifted on May 25, 2020, with new weekly cases numbering in double digits.

Many experts and key stakeholders consulted for this report noted that the PA was hindered in its ability to respond adequately to the COVID-19 pandemic due to legal constraints around its areas of control as well as a lack of financial resources. Despite these limitations, the PA exercised its authority to advance a number of initiatives, including providing limited cash-based transfers, food baskets, and digital food vouchers to vulnerable families, negotiating a tripartite agreement between the government, the Palestinian General

Federation of Trade Unions, and other private sector representatives to mitigate the impacts of the lockdown on Palestinian workers in certain sectors, as well as several other initiatives.⁸

Economic Impacts of COVID-19

The economic impacts of COVID-19 have been significant for Jordan and Palestine and have compounded challenges that existed prior to the start of the pandemic, including fiscal crises and high unemployment rates that threatened the economic wellbeing of their populations.

The economic and fiscal impacts of COVID-19 have been significant for Jordan and Palestine and have compounded challenges that existed prior to the start of the pandemic

During the pandemic, unemployment in Jordan increased most significantly amongst youth and blue-collar workers. According to local stakeholders, new entrants to the labor force were often the first employees that were laid off, which led to significant job losses among youth. While many white-collar professionals were able to transition to working remotely throughout the pandemic, the majority of blue-collar jobs relied on in-person labor that could not take place during lockdowns.⁹

In Palestine, the pandemic has had debilitating effects on the labor market. Subject matter ex-



perts and local stakeholders consulted for this report stressed that the PA was facing a dire fiscal situation in early 2020 due to prolonged delays in the transfer of clearance revenues from Israel. Most interviewees acknowledged that the initial lockdown instituted by the PA was successful in responding to public health concerns at the beginning of the pandemic, but also noted that it resulted in widespread economic consequences that permeated all levels of Palestinian society.

Local stakeholders and subject matter experts described a domino effect in which lower business revenues resulting from reduced consumer demand during lockdowns led Palestinian businesses to decrease salaries or lay off staff. The resulting drops in individual incomes further decreased demand, placing additional cash flow constraints on businesses.

Impacts of COVID-19 on Business

As referenced above, the pandemic has had a significant impact on business revenues as well as their ability to retain staff and pay salaries. The availability of jobs is critical for advancing youth economic opportunities, so it is important to understand how businesses are faring and their likelihood of hiring. Overall, the study found that most businesses surveyed experienced negative effects stemming from the pandemic, but many are optimistic about their potential for future increases in revenue and staffing. The study generated the following findings about the impact of the pandemic on the private sector:

The majority of surveyed companies experienced negative impacts on their businesses as a result of the pandemic. In Jordan, 56% of surveyed firms indicated that they had experienced reduced demand for their products or services as a result of the pandemic, as had 51% in Palestine. In addition, 43% of surveyed firms in Jordan and 51%

Most businesses surveyed experienced negative effects stemming from the pandemic, but many are optimistic about their potential for future increases in revenue and staffing

in Palestine experienced temporary shutdowns. Companies that experienced either no impact or an increase in demand tended to belong to the healthcare and food production industries or sectors highly amenable to telework.

Moreover, surveyed employers in Jordan were significantly more likely than those in Palestine to have received government support during the pandemic. This is not surprising given the varying approaches to the pandemic response that the GoJ and the PA were able to pursue given their differing levels of fiscal resources. However, it is notable that 40% of employers in Jordan indicated that they had not received any government support.

In both Jordan and Palestine, the majority of firms surveyed remained of a similar size prior to the pandemic compared to a year and a half into it. This was true for 79% of surveyed firms in Jordan and 80% in Palestine. A small share of firms grew to the extent that they moved into a new size classification (e.g., businesses previously classified as small businesses hired enough staff to be considered medium-sized businesses), including 6% of surveyed firms in Jordan and 4% of surveyed firms in Palestine. However, 13% of surveyed firms



in Jordan downsized, as did 12% in Palestine. It is important to note that the timing of the survey a year and a half into the pandemic means that the findings pertain only to firms that survived multiple rounds of COVID-19 lockdowns and restrictions. However, the responses of this group are most relevant to understanding the potential for job growth in the coming years.

Employers in Jordan and Palestine were optimistic about company revenue growth over the next two years, with those in Palestine being the most so. In Jordan, 73% of employers surveyed felt that it was likely or extremely likely that their company revenue would increase over the next two years, as did 83% in Palestine.

Survey results indicate that there is significant potential for hiring over the next two years in both Jordan and Palestine. Half of employers surveyed in Jordan and Palestine indicated that they expect to hire additional employees over the next two years, and one-third expect to maintain their current staff size. Only 6% of surveyed employers in Jordan and 10% in Palestine anticipated decreasing their current workforce over the coming two years. Surveyed Jordanian companies expect to hire a larger number of staff than those in Palestine. This is likely because the Jordan sample included a greater proportion of larger companies than the Palestine sample, as the analysis revealed that larger firms were more likely to be planning to hire greater numbers of staff.

Impact of COVID-19 on Work Modalities

One of the defining features of work culture during the pandemic has been the transition to telework at an unprecedented scale and pace. Organizations and workers in Jordan and Palestine participated in this trend. However, only an estimated 29% of jobs in Jordan and 23% in Pal-

estine are amenable to telework,¹⁰ which meant that the benefits of telework were not equally distributed among workers. This disparity in access also meant that a significant share of the labor force in Jordan and Palestine faced challenges in accessing employment during lockdown periods. The results of the youth and employer surveys generated the following findings regarding telework:

Access to teleworking opportunities a year and a half into the pandemic was varied, and was likely affected by sector of employment and the timing of COVID-19 waves of infection. In Jordan, 41% of employers surveyed reported that at least some of their staff were teleworking or had a flexible teleworking arrangement at the time of the survey, as did 61% of employers surveyed in Palestine. Within Palestine, employer respondents in Gaza were nearly twice as likely as those in the West Bank to indicate that at least some of the company's staff were teleworking as a result of COVID-19 (81% compared to 43%).

The differences in teleworking adoption observed in Jordan and Palestine may be driven by variation in sector representation within the two samples. The differences between Gaza and the West Bank, however, may be due to the fact that the pandemic hit Gaza later than the West Bank, potentially prompting more employers in Gaza to still be offering teleworking at the point of survey administration. The after effects of the May 2021 hostilities may also be playing a role.

Among youth who maintained the same job during the first year and a half of the pandemic, 29% in Jordan and 63% in Palestine were permitted to telework. The differences in youth access to teleworking opportunities were not necessarily related to sector of employment or occupation, as there were no significant differences in these factors within this subset of youth in the Jordan and Palestine samples. The differences observed also



do not appear to be related to varying rates of virtual freelancing among youth in Jordan and Palestine, as none of the employed youth surveyed indicated that they were working under freelancing contracts.

Given this lack of variation and sample size limitations, the analysis did not produce conclusive evidence regarding the potential determinants of youth access to teleworking opportunities. In addition, the differences in sector distributions between the employer samples from Jordan and Palestine limit the potential to conclude whether the provision of teleworking options is more or less prevalent in either location. Further research is needed to draw more definitive conclusions.

Although telework options were offered by some companies prior to the pandemic, many companies in Jordan and Palestine moved to expand this option or offer it for the first time as a result of COVID-19. Among surveyed employers in Jordan who indicated that some staff at their company were teleworking as a result of COVID-19, 61% of them did not have any staff teleworking prior to the pandemic. Furthermore, 78% of companies that had at least some employees teleworking at the point of survey administration indicated that the current share of teleworking employees was greater than that of the pre-pandemic period.

Among surveyed employers in Palestine who indicated that some staff were teleworking as a result of COVID-19, 38% of them did not have any staff who were teleworking prior to the pandemic. In addition, 78% of employers indicated that the overall share of their staff who were teleworking a year and a half into the pandemic was greater than the share who were teleworking prior to COVID-19.

There was notable variation in the share of employees to whom surveyed companies in Jordan and Palestine offered teleworking opportunities

Study results suggest that for many employers in Jordan and Palestine, the transition to telework may remain a temporary experiment rather than constituting a permanent shift in work culture

a year and a half into the pandemic. Among employers in Jordan who offered teleworking options at that point, nearly half (47%) offered it to fewer than 10% of their staff, compared to 27% of employers in Palestine who offered it to the same share of staff. The abovementioned variation in employer sector of operation may have affected the share of employees to whom surveyed companies could feasibly extend teleworking options. Companies operating in the ICT field, for example, could feasibly have all of their staff engaged in telework, whereas those operating in sectors such as retail or hospitality could likely only extend this option to administrative and managerial staff.

Study results suggest that for many employers in Jordan and Palestine, the transition to telework may remain a temporary experiment rather than constituting a permanent shift in work culture. However, for others, it appears that their employees may continue to benefit from increased flexibility post-pandemic. A significant share of employers stated that all of their employees would return to their normal worksite after the pandemic, totaling 45% of surveyed employers in Jordan and 55% in Palestine. However, 21% of these employers in Palestine also stated that some or



all of their employees would maintain a flexible teleworking arrangement, indicating a degree of flexibility even for those who return to their usual worksites.

Trends in Employment of Vulnerable Youth

Youth were among the populations most affected by the COVID-19 pandemic given their already low rates of labor force integration in the form of high unemployment rates and limited work experience. Intersecting vulnerabilities of gender, refugee status, disability, and residence in under-resourced locations further compounded the negative impacts of the pandemic on youth. The study generated the following insights on the experiences of vulnerable youth in the labor market during the first year and a half of the pandemic:

Sixty percent of surveyed employers in Jordan had no refugees on staff a year and a half into the pandemic. Data suggests that when firms downsized during the pandemic, refugees may have been let go at higher rates than Jordanians. Although there was no statically significant change in the proportion of staff at surveyed companies who were refugees prior to the pandemic compared to a year and a half into it, 12 of the 124 (9.7%) surveyed firms indicated that they had reduced the share of their staff who were refugees between the two points in time.

In addition, among the 16 companies in the sample that reduced their overall staff size during the first year and a half of the pandemic, there was a notable drop in the share of their employees who were refugees during this period. Among these companies, 12.5% indicated that between 1-9% of their employees were refugees prior to the pandemic, and 44% indicated that 10% or more of their employees were refugees at that point. However, a year and a half into the pandemic,

37.5% of these companies indicated that just 1-9% of their employees were refugees, and only 18.5% indicated that 10% or more were refugees. Due to the small sample size of this group, these results should be interpreted cautiously. However, they are in line with the findings of a survey conducted by the International Labour Organization (ILO) and Fafo Institute for Labour and Social Research (Fafo) in April 2020 that documented higher rates of permanent job losses among Syrian refugees in Jordan following the start of the COVID-19 crisis.¹¹

Approximately a quarter of surveyed firms in Jordan and Palestine had persons with disabilities on staff a year and a half into the pandemic.

Twenty-five percent of surveyed companies in Jordan indicated that between 1-9% of employees were persons with disabilities, as did 21% of companies in Palestine. Three percent of surveyed companies in Palestine had 10% or more of their staff made up of persons with disabilities. In Jordan, 73% of employers surveyed indicated that their companies did not employ any persons with disabilities at the time of the survey, as did 75% of companies in Palestine.

A year and a half into the pandemic, 60% of surveyed employers in Jordan reported that none of their staff members were refugees

There were no statistically significant differences in the hiring patterns of persons with disabilities among surveyed firms in Jordan prior to the pandemic compared to a year and a half into it. In Palestine, although 95% of employers surveyed



maintained the same share of persons with disabilities among their staff during the first year and a half of the pandemic, 4% decreased their share. None of the surveyed employers increased their share of employees who were persons with disabilities.

There is significant potential for future studies to further explore the employment outcomes of persons with disabilities in Jordan and Palestine, and to propose evidence-based programming approaches to support their engagement in the labor market. Employment outcomes for youth with disabilities during the pandemic were not possible to discern through the youth survey with a high level of validity due to the small number of persons with disabilities who participated in the survey (14 in Jordan and six in Palestine). This was a limitation of the study.

Employment outcomes of surveyed youth during the pandemic varied significantly according to youth vulnerability, which suggests that more targeted, wraparound services could be helpful in closing the employment gap for refugees, women, and youth in Gaza during the COVID-19 recovery. In Jordan, there were no statistically significant differences in employment rates between young men and women at the start of the pandemic, but the gap widened significantly a year and a half into it. By that point, young men were more than twice as likely as young women to be working.

In Palestine, young men were between 59% and 82% more likely to be employed than young women at the start of the pandemic and a year and a half into it. Jordanians were between two and three times as likely as refugees in Jordan to be employed, and youth in the West Bank maintained a significant employment lead of between 54% and 137% over their peers in Gaza at the start of the pandemic and a year and a half into it.

Characteristics of Youth Job Placements

The youth survey aimed to understand the employment outcomes and economic wellbeing of youth in Jordan and Palestine over the course of the pandemic by inquiring about their employment activities, hours worked, sufficiency of income, government support received, and contributions made to their households. This exploration resulted in the following insights:

Youth struggled to enter and remain in the labor market during the pandemic, but programming that offered direct job placement support appears to have significantly increased their chances of securing a job. A year and a half into the pandemic, 28% of surveyed youth in Jordan and 32% of surveyed youth in Palestine indicated that they were working. Surprisingly, there was no statistically significant change in overall youth employment rates among surveyed youth in Jordan or Palestine at the time of the survey compared to the start of the pandemic.

This may be due, in part, to the points in time at which surveyed youth completed EFE trainings. Youth surveyed under this study completed EFE trainings between the first quarter of 2019 through the first quarter of 2021. Graduates of programming in the latter part of 2019 would have had limited time to find a job prior to the start

Employment outcomes of surveyed youth during the pandemic varied significantly according to youth vulnerability



of the pandemic, and those pursuing training in 2020 through the first quarter of 2021 would have faced challenges in entering the job market given the economic impacts of COVID-19.

The employment rates were also likely affected by the makeup of the sample, which included youth who completed different types of EFE trainings, including Job Training and Placement (JTP), Entrepreneurship, and Pathways to a Job. JTP provides youth with the needed soft, and sometimes technical skills, to succeed in the workplace and involves direct job placement support that is not provided under other programming types. Regular EFE program monitoring results indicate that among graduates of JTP programming delivered during the same period as that which the sample was selected, 63% of program graduates in Jordan and 87% in Palestine secured employment. As such, the lower employment rates recorded under this study could reflect the importance that job placement support plays in easing youth transitions into the workforce following the completion of skills training.

Employed youth in Jordan and Palestine were most likely to be working in full-time positions a year and a half into the pandemic. Youth in Gaza were more likely to be working in less secure forms of employment than their peers in the West Bank, both before the pandemic and a year and a half into it. Among employed youth surveyed in Jordan, 68% were working in full-time positions a year and a half into the pandemic, as were 48% of those in Palestine. The next most common position types were self-employment (15% in Jordan and 19% in Palestine) and part-time positions (12% in Jordan and 16% in Palestine).

Youth in the West Bank were 73% more likely than their peers in Gaza to be working in full-time positions a year and a half into the pandemic (68% of employed youth in the West Bank compared

to 40% in Gaza), while youth in Gaza were nearly twice as likely as their peers in the West Bank to be working on self-employment activities (23% compared to 12%). Youth in Gaza were also more likely than their peers in the West Bank to be working in part-time positions, temporary/seasonal jobs, and paid internships.

More than half of employed youth surveyed a year and a half into the pandemic in Jordan and a third in Palestine indicated that their incomes were never sufficient to cover their basic needs each month

At the start of the pandemic, youth in the West Bank were 91% more likely than their peers in Gaza to be working in full-time positions (57% compared to 30%) and youth in Gaza were more than twelve times as likely as their peers in the West Bank to be working in temporary or seasonal positions (25% compared to 2%). As such, although the pandemic exacerbated the youth employment challenge in Gaza, young Gazans were already struggling to secure stable employment arrangements prior to the COVID-19 crisis.

Youth engaged in wage employment or internships in both Jordan and Palestine were most likely to be working under limited term contracts, and around one in four were working informally. A year and a half into the pandemic, 47% of surveyed youth who were engaged in wage employment or internships in Jordan were working under limited term contracts, as were 39% of those



in Palestine. In addition, 24% of youth engaged in wage employment or internships in Jordan and 29% in Palestine were working under informal contracts. Although limited term contracts do not necessarily signify instability of employment given that they can be renewed, the significant share of youth working informally is concerning given that informal workers do not have access to the same social protections as those working formally, particularly in Jordan.

Youth occupations were gendered in some circumstances, which points to the potential for youth workforce development programming to work with youth, particularly young women, to expand their perspectives on their potential to succeed in non-traditional career paths. It may also point to the potential for organizations to work with employers to develop diversity recruitment strategies. In Jordan, young men had a greater tendency to be working in science and engineering positions than did young women. In Palestine, young men had a greater tendency than young women to be working in jobs requiring manual labor, whereas young women were more likely than young men to be working as teaching professionals.

A significant share of employed youth feel that their incomes are insufficient to cover their basic needs. More than half of employed youth surveyed a year and a half into the pandemic in Jordan and a third in Palestine indicated that their incomes were never sufficient to cover their basic needs each month. Youth in Jordan were 62% more likely than youth in Palestine to indicate that their incomes never met their basic needs, and youth in Palestine were more than five times as likely as youth in Jordan to indicate that their incomes covered their basic needs all the time.

The differences in responses between Jordan and Palestine may reflect the relatively higher edu-

cational attainment of the individuals who participated in the survey in Palestine compared to Jordan, as a higher level of education would likely increase youth access to higher paying job opportunities. It may also reflect differences in the cost of living in Jordan and Palestine relative to the minimum wage.

Within Palestine, youth employed a year and a half into the pandemic in the West Bank were significantly more likely than their peers in Gaza to indicate that their incomes covered their basic needs each month. In the West Bank, 60% of employed youth indicated that their income was sufficient most or all of the time, compared to just 31% of youth in Gaza.

Some youth experienced reductions in pay following the start of the COVID-19 crisis. Youth who maintained the same position throughout the first year and a half of the pandemic were asked if their current monthly income differed from the monthly income that they earned immediately prior to the COVID-19 crisis. A large share of youth indicated that their monthly income had stayed the same (70% in Jordan and 45% in Palestine), and some even experienced increases (11% in Jordan and 24% in Palestine). However, 19% in Jordan indicated that they experienced decreases in their income, as did 31% in Palestine.

Youth opinions about the insufficiency of their incomes may have pre-dated the pandemic, and may have a gender dimension. There were no statistically significant differences in youth perspectives on the sufficiency of their income based on whether it was gained from positions that they held at the start of the pandemic and maintained through a year and a half into it, positions that they held at the start of the pandemic but left, or positions that they started after the beginning of the pandemic. This lack of variation in perspectives likely points to the existing challenges



that youth have experienced more generally with regards to the sufficiency of entry-level wages. Among youth in Jordan who were employed at the start of the pandemic, young women were nearly three times as likely as young men to indicate that their income was never sufficient (61% compared to 22%).

Most surveyed youth in Jordan and Palestine who were employed a year and a half into the pandemic were providing at least some of their income to their households each month. In Jordan, 67% of employed youth indicated that they gave at least some of their income to their households, as did 59% in Palestine, with no statistically significant difference between the two.

In Jordan, employed young men were more likely than employed young women to report giving larger amounts of their incomes to their households. Among employed young men, 68% reported giving more than 20% of their incomes to their households, compared to 36% of young women. Employed young women were more likely than employed young men to report giving between 1-20% of their incomes to their households (28% of young women vs. 4% of young men).

In Palestine, there were no statistically significant differences between the contributions that young men and women reported making to their households. However, employed youth in Gaza were 52% more likely than those in the West Bank to indicate that they provided at least some amount of their income to their households each month.

Between youth employed in Jordan at the start of the pandemic and those employed a year and a half into it, there were no statistically significant differences in the average share of their incomes that they contributed to their households during their employment. The same was true for youth surveyed in Palestine. This suggests that

the pandemic may not have led employed youth to provide greater shares of their incomes to their households than they would have otherwise.

Most youth who maintained the same job throughout the pandemic did not experience significant changes in their tasks on-the-job compared to the period immediately prior to the COVID-19 crisis. Among youth who maintained the same job, 92% of youth in Jordan and 83% in Palestine indicated that their tasks had not changed. Youth in Jordan and Palestine who did experience changes indicated that work pressure had increased. Youth in Palestine noted that this included increased hours and tasks in some cases.

Employed youth in Gaza were 52% more likely than those in the West Bank to indicate that they provide at least some amount of their income to their households each month

Youth who were working at the start of the pandemic and a year and a half into it do not appear to have experienced reductions in working hours. This was true both for youth who held the same position for the first year and a half of the pandemic and for those who switched jobs.

Some youth in Jordan and Palestine who left employment during the pandemic did so due to the impacts of COVID-19, but the temporary nature of their employment was a more commonly cited factor for leaving. The 14% of surveyed youth in both Jordan and Palestine who were engaged in wage employment or internships at the start of



the pandemic but who left their positions prior to the survey administration were most likely to indicate that they had done so because their positions were temporary, accounting for 36% of this group in Jordan and 48% in Palestine.

The next most commonly cited reasons in Jordan were that the job was not sufficiently prestigious (15%), that they were laid off from their job due to COVID-19 (11%), and that their employer ceased business activities due to the shutdowns related to COVID-19 (9%).

In Palestine, the next most commonly mentioned reasons following the temporary nature of young people's positions were that their employer ceased business activities due to shutdowns related to COVID-19 (14%), they were laid off from their job due to COVID-19 (11%), and that they were concerned about potential exposure to COVID-19 in the workplace (11%).

Youth Job Search Behavior and Economic Inactivity During the Pandemic

The study aimed to understand job search behavior among youth who were not currently employed, in addition to understanding the reasons why some youth remained economically inactive (i.e., not employed or looking for work). The study generated the following insights on these topics:

The majority of youth who were not employed a year and a half into the pandemic were looking for work, and most had been looking for more than a year. In Jordan, 79% of youth who were not employed at the time of the survey were looking for jobs, as were 87% in Palestine. There was no statistically significant difference in job search rates between young men and women in either Jordan or Palestine. However, Jordanian youth were 24% more likely than refugee youth to be looking for

work, and youth in Gaza were 24% more likely than those in the West Bank to be looking.

Among youth who were actively looking for work a year and a half into the pandemic, 69% in Jordan and 68% in Palestine had been looking for more than a year. In Jordan, young women were 43% more likely than young men to be looking for work for more than a year (72% of young women compared to 50% of young men). This finding underscores the difficulty that many youth experienced in finding work during the pandemic, especially young women.

The use of different job search techniques varied between young men and women as well as between Jordanian and refugee youth. Internet job applications were the most commonly cited method, used by 88% of youth in Jordan and 94% in Palestine during the three months preceding the survey, followed by personal contacts, used by 43% of youth in Jordan and 44% of youth in Palestine. Young men in Palestine were more likely than young women to use personal contacts as one of their primary job search methods (59% of men compared to 40% of women), but they were less likely than young women to use internet job applications as one of their primary methods (82% of men compared to 98% of women).

Among Jordanian youth, 18% indicated that they had emailed employers directly as a primary job search method during the three months preceding the survey, compared to 0% of refugee youth. The use of personal contacts to search for a job was common among refugee youth, with refugees being twice as likely as Jordanians to have used this method to look for a job during the past three months (70% compared to 35%).

A year and a half into the pandemic, unemployed youth felt that an insufficient availability of jobs was the primary obstacle that had pre-



vented them from finding a job. Youth from more vulnerable backgrounds were less likely to cite COVID-19 as the driver of the job shortage. Unemployed youth in Jordan were seven times as likely as unemployed youth in Palestine to believe that COVID-19 was the reason that there was an insufficient number of jobs available (35% compared to 5%). Youth in Palestine, meanwhile, were 84% more likely than youth in Jordan to believe that they had not found a job due to a general lack of opportunities in the market, without reference to COVID-19. This difference is likely a reflection of the higher rates of unemployment that existed in Palestine compared to Jordan prior to the pandemic.ⁱⁱ

Among youth who were actively looking for work a year and a half into the pandemic, 69% in Jordan and 68% in Palestine had been looking for more than a year

In addition, Jordanian youth were more than twice as likely as refugee youth to indicate that the primary obstacle was that COVID-19 had reduced the number of jobs available (41% compared to 17%). This difference likely reflects the fact that prior to the pandemic, refugees in Jordan already faced a shortage of available opportunities due to restrictions in the industries in which they are permitted to work. These restrictions would have lessened the extent to which refugee youth felt

that the job shortage was due to the pandemic.

Similarly, youth in Gaza were more than twice as likely as youth in the West Bank to cite a general lack of job opportunities in the market as being the key obstacle to finding a job (53% in Gaza compared to 25% in the West Bank). Only 5% of youth in Gaza, compared to 13% of youth in the West Bank, indicated that the primary obstacle was that COVID-19 had reduced the number of jobs available. As referenced above, youth in Palestine were already facing a significant shortage of job opportunities prior to the pandemic, and this was particularly true for youth in Gaza. As such, although vulnerable youth were most affected by the economic impacts of COVID-19, the existing job shortages they faced prior to the crisis appear to have decreased the extent to which they felt that COVID-19 was the main driver of the shortage.

Young women in Jordan and Palestine were between two and three times as likely as young men to be economically inactive a year and a half into the pandemic. Among surveyed youth in Jordan, 17% of young women were economically inactive, meaning that they were not currently employed or looking for work, compared to 6% of young men. In Palestine, 10% of young women were economically inactive compared to 5% of young men.

Among economically inactive young women in Jordan, 47% cited family responsibilities as the reason why they were not looking for work, indicating that it forms a key driver of women's economic inactivity. The next most commonly cited reasons were that they were currently focused on studying (18%), they did not find suitable opportunities (10%), and that they would begin studying again soon (10%).

ⁱⁱ ILO estimates for unemployment of the total population in 2019 were 25.3% for Palestine compared to 16.8% for Jordan. Source: World Bank Databank.



Among economically inactive young women in Jordan, 47% cited family responsibilities as the reason why they were not looking for work

The most common reason that young women in Palestine provided for not looking for a job was that they were currently focused on studying, cited by 62%. Young women in Palestine were more than three times as likely as young women in Jordan to cite this reason. A local expert consulted for this report noted that, in response to the shortage of job opportunities in the market, many youth in Palestine choose to continue their pursuit of higher education in an effort to invest in themselves over the long term.

Relatively smaller shares of economically inactive young women in Palestine explained that they were not looking for work because they did not find suitable opportunities (10%) and that they were not interested in working (10%). Only 7% of surveyed young women in Palestine cited family responsibilities as the reason why they were not looking.

Impact of COVID-19 on Youth Communities

The youth survey examined the impacts that COVID-19 had on the economic opportunities of both youth and their communities. The study generated the following insights:

COVID-19 had highly negative impacts on economic opportunities not just for youth, but also

for their communities. More than half of youth surveyed in Jordan and more than a third of youth surveyed in Palestine had friends or family members who lost employment as a result of COVID-19 (54% compared to 38%). Among refugee youth in Jordan, 70% indicated that they had friends or family who lost employment, compared to 50% of Jordanian youth.

The difference in the share of surveyed youth in Jordan and Palestine who had friends or family members who lost employment is likely a reflection of the higher rates of unemployment that existed in Palestine prior to the pandemic and the significant impact that COVID-19 had on employment opportunities for refugees in Jordan. The higher pre-pandemic unemployment rate in Palestine would likely have meant that a larger proportion of young people's friends and family were already unemployed prior to the pandemic, and therefore, a smaller proportion of them would have lost jobs following the outbreak of COVID-19.

The observed difference between the survey results in Jordan and Palestine may also be due to the differing socioeconomic backgrounds and age makeup of the youth surveyed in Palestine compared to Jordan. As mentioned previously, youth in the Palestine sample had a higher average education level than those in the Jordan sample. If the employed family members of the youth respondents in Palestine had a similar level of education, it may mean that they were working in jobs that were amenable to telework and could therefore have been maintained during the COVID-19 lockdowns.

The youth surveyed in Palestine were also younger on average than the youth surveyed in Jordan. In Palestine, 70% of surveyed youth were 25 years old or younger compared to just 46% of respondents in Jordan. This likely means that the peers of many of the surveyed youth in Palestine were



engaged in university studies rather than employment, and therefore would not have lost employment as a result of COVID-19.

More than half of youth surveyed in Jordan and more than a third of youth surveyed in Palestine had friends or family members who lost employment as a result of COVID-19

In Jordan, 75% of youth had friends or family members who faced obstacles in finding employment following the start of the pandemic, compared to 52% in the West Bank and 66% Gaza. Jordanian and refugee youth were equally likely to state that friends or family members had faced obstacles. The relatively higher share of youth in Jordan compared to those in Palestine who indicated that their friends or family members experienced obstacles to finding employment may also be a reflection of the differing socioeconomic and age characteristics of the respondents in the two samples, as explained above.

Similar to the opinions of unemployed youth on why they themselves had not found employment, youth whose family and friends struggled to secure jobs cited an insufficient availability of job opportunities in the market as the primary obstacle they faced. However, youth from more vulnerable backgrounds were less likely to cite COVID-19 as the driver of the job shortage, which likely reflects the relatively greater challenges that their communities faced in securing employ-

ment prior to the pandemic. Youth in Jordan were more than twice as likely as youth in Palestine to believe that a reduction in the number of jobs available due to COVID-19 was the main obstacle that their friends and family faced in finding employment, whereas youth in Palestine were nearly four times as likely as youth in Jordan to cite a general lack of opportunities in the market as the main culprit.

In Jordan, both Jordanian and refugee youth were most likely to feel that the impact of COVID-19 on job availability was the principal obstacle that their friends and family faced in securing employment. However, Jordanian youth were 33% more likely than refugee youth to cite this reason. In addition, refugee youth were more than twice as likely as Jordanian youth to cite a general lack of opportunities in the market as the principal obstacle.

Although overall unemployment rates in Jordan were relatively high prior to the crisis, refugees faced additional challenges in securing employment beyond those faced by their Jordanian peers. Syrian refugees face legal restrictions on the sectors and job types in which they are legally permitted to work, and refugees from other countries are not permitted to secure work permits and remain registered with UNHCR.¹²

Concerns around the potential to be infected by COVID-19 appear to have been eclipsed by more economic and practical concerns for youth and their communities. Among surveyed youth who left jobs that they held at the beginning of the pandemic, 11% in Palestine indicated that they did so out of concern over the potential to be exposed to COVID-19 in the workplace, as did 3% in Jordan. However, a mere 0.5% of unemployed youth in Jordan and 0% in Palestine cited COVID-related health considerations, such as concern about working due to possible exposure to COVID-19, as



principal obstacles that had prevented them from finding a job.

Furthermore, none of the youth respondents in Jordan and only 5% of youth in Palestine cited COVID-related concerns as the main obstacle that their friends and family had faced in finding employment. Among youth who were economically inactive, none of the youth respondents in Jordan and only 3% in Palestine cited COVID-related concerns as the reason why they were not looking for a job.

This suggests that among surveyed youth and their communities, economic and practical needs may have been of relatively higher concern than the potential health impacts of the pandemic. This is not necessarily reflective of community attitudes surrounding the seriousness of the health threat posed by COVID-19. Rather, it is likely a reflection of the pressing challenges that many households have been facing in meeting their basic needs.

Looking Forward: Promising Programming, Skills, and Sectors for Youth

The study explored youth demand for workforce development programming, the skills they will need for success in the labor market during the COVID-19 economic recovery, and promising sectors for youth employment in Jordan and Palestine during the recovery.

Youth felt that the most important services for young people looking for jobs in their cities were labor market connections as well as technical and soft skills training. Youth in Palestine were significantly more likely than those in Jordan to feel that incubator services for start-ups were important. Regarding connections to labor markets, youth in Jordan were more likely than youth in Palestine to indicate that assistance to locate

job opportunities was an important service (64% compared to 26% in Palestine) and youth in Palestine were more likely to indicate that connections with employers more generally were most important (40% compared to 22% in Jordan).

Surveyed youth in Palestine were significantly more likely than those in Jordan to feel that incubator services for start-ups were an important resource for young people in their cities

Jordanian youth were 66% more likely than refugee youth to indicate that technical skills training was an important service (75% of Jordanians compared to 45% of refugees). Jordanians were also 49% more likely than refugees to state that soft skills training was important (48% of Jordanians compared to 32% of refugees). For their part, refugee youth were most focused on the need for services to locate job opportunities, with 72% of refugee youth respondents stating that it was important.

Young women in Jordan were more likely than young men to indicate that technical skills training was an important service (71% vs. 53%, respectively) and were more than three times as likely as young men to indicate that assistance to connect with employers was important (25% vs. 8%, respectively). These differences suggest that young women in Jordan may benefit from an increased focus on technical training involving apprenticeship models.



Youth in Palestine were also significantly more likely than youth in Jordan to indicate that incubator services for start-ups were important (26% compared to only 1%). The high proportion of surveyed youth in Palestine who indicated that incubator services for start-ups were important is notable, as only 7% of youth in the overall population of program graduates from which the sample was selected in Palestine completed entrepreneurship training, compared to 19% of the overall population of graduates in Jordan. This large share of youth in Palestine who stated that incubator services are important may indicate that many youth in Palestine feel the need to pursue entrepreneurship opportunities as a method for overcoming job scarcity.

Demand for Skills

The youth and employer surveys aimed to understand youth expectations regarding the skills they would need to succeed in the labor market over the next two years, in addition to understanding employer demand for skills over the same period. The results from this exploration generated the following insights:

Youth in Jordan and Palestine agreed that ICT/digital and communication skills were top skills that young people would need to succeed in the labor market over the next two years. The top three skills that youth in Jordan thought young people would need to succeed were language skills (68% of youth), ICT/digital skills (58%), and communication skills (31%). In Palestine, youth were most likely to indicate that ICT/digital skills (71%), communication skills (51%), and technical/job-specific skills (35%) were the most important.

In addition, surveyed youth in Palestine were nearly seven times as likely as those in Jordan to believe that knowing how to work remotely would be a critical skill for youth success in the labor

market over the next two years and were 23% more likely than youth in Jordan to state that ICT/digital skills were critical. They were also more likely than youth in Jordan to indicate that communication and technical job-specific skills were important. However, youth in Jordan were twice as likely as those in Palestine to feel that language skills were critical.

The relatively higher focus on ICT/digital, remote working, technical job-specific, and communication skills in Palestine may be driven by a sense that the limited prospects for job creation within Palestine necessitates a look toward global markets through digital jobs.

Employer opinions on the most important skills for new employees differed from youth opinions on the most important skills for success in the labor market. Most employers do not anticipate a change in the skills needed among their employees in the coming years compared to the pre-pandemic period. In Jordan, employers were more than five times as likely as youth to indicate that technical job-specific skills were most important, 30% more likely to indicate that communication skills were most important, and more than three times as likely to indicate that team-

Surveyed youth in Palestine were nearly seven times as likely as those in Jordan to believe that knowing how to work remotely would be a critical skill for youth success in the labor market over the next two years



work was most important. In Palestine, employers were 60% more likely than youth to feel that technical job-specific skills were important and more than twice as likely as youth to feel that teamwork was most important.

EFE has found in conversations with employers outside of this study that although technical skills are often emphasized as being central to hiring decisions, employers also note that poor soft skills often form a key impetus for letting employees go. The recognition of employer survey respondents that communication and teamwork are top skills alongside technical job-specific skills appears to reinforce the complementarity of technical and soft skills for youth success on-the-job.

Employers in both Jordan and Palestine placed significantly less emphasis on ICT/digital skills than youth. Respondents to the employer survey may have considered ICT/digital skills to fall under the category of technical/job-specific skills, or they may feel that these skills are not the most critical for their particular companies. The divergence in youth and employer opinions may also indicate that youth opinions on needed skills focused to some extent on aspirational jobs, whereas employer responses were rooted in an

understanding of their upcoming hiring needs, which may be less dependent on ICT/digital skills.

Among surveyed employers in Jordan, 78% indicated that they anticipate needing the same skills among their employees in the coming years compared to the pre-pandemic period, as did 70% of employers in Palestine.

Youth Opinions on Promising Sectors for Employment and Virtual Jobs

In order to understand youth expectations regarding the labor market, respondents to the youth survey were asked to identify the top two sectors that they thought would offer the most job opportunities for young people over the next two years. They were also asked about their interest in virtual jobs and were prompted to share their opinions regarding the feasibility of working in these positions. The study generated the following insights:

Youth in both Jordan and Palestine were optimistic that the ICT and advertising/marketing/public relations sectors would offer the most opportunities for young people over the next two years. Refugee youth in Jordan also saw opportunity in a number of sectors, primarily those in which Syrians are legally permitted to work. In Jordan, 56% of surveyed youth believed that the ICT sector would offer the most opportunities, as did 60% of surveyed youth in Palestine. In addition, 31% of youth in Jordan felt that advertising/marketing/PR would offer the most opportunities, compared to 51% in Palestine. Youth in Gaza were even more optimistic about ICT and advertising/marketing/PR than their peers in the West Bank, likely due to the potential that they offer for virtual jobs.

Jordanian youth were twice as likely as refugee youth to indicate that ICT would offer the most job opportunities for youth in the coming two

In Jordan, 56% of surveyed youth believed that the ICT sector would offer the most job opportunities for youth over the next two years, as did 60% of surveyed youth in Palestine



years. Refugee youth were more likely than Jordanians to believe that HVAC (20% of refugees compared to 3% of Jordanians), agriculture (12% compared to 4%), and construction (12% compared to 4%) were promising sectors. It is likely that refugee youth in Jordan expect there to be opportunities in the agriculture and construction sectors because they are legally permitted to work within them.

In addition, only 3% of youth in Jordan and 2% in Palestine stated that government/civil service was a promising sector. This suggests that although many young people still hold preferences for government jobs, their attitudes may have begun to shift in response to the reality of shrinking opportunities in the sector.

Unemployed youth in Jordan and Palestine, including young women, expressed a high level of interest in working in virtual jobs. In Jordan, 72% of youth indicated that they were interested in working in virtual jobs and 15% indicated that they were extremely interested. In Palestine, 53% of youth indicated that they were interested and 27% indicated that they were extremely interested. Only 3% of youth in Jordan and 8% of youth in Palestine indicated that they were not at all interested or not interested in working in virtual jobs. Interest was particularly high among young women in Palestine and refugees in Jordan.

Most youth in Jordan and Palestine indicated that working in virtual jobs would be feasible for them. In Jordan, 97% of youth stated that it would be either feasible or very feasible for them to work in a virtual job, as did 86% in Palestine. However, the share of youth who indicated that it would be very feasible was higher in Jordan (78%) compared to Palestine (61%).

In Jordan, young men were more likely than young women to indicate that it would be very feasible

(92% compared to 76%), but there was no statistically significant difference between the responses of young men and women in Palestine. There were also no significant differences in the responses of Jordanians and refugees living in Jordan, or in the responses of youth in the West Bank versus Gaza. This is surprising given the differing levels of vulnerability between youth belonging to each group. It is possible that youth responses were partially informed by their aspirations to work in virtual jobs, or to secure employment more generally, and thus may have overestimated their feasibility to some extent.

Only 3% of youth in Jordan and 8% of youth in Palestine indicated that they were not at all interested or not interested in working in virtual jobs

Among youth who felt that virtual jobs would be infeasible for them, internet connectivity and electricity connections were cited as the main concerns. Youth in Jordan were 80% more likely than youth in Palestine to cite internet connectivity as a concern (85% in Jordan compared to 47% in Palestine), and youth in Palestine were more than twice as likely as those in Jordan to mention electricity connections as a concern (69% in Palestine compared to 26% in Jordan). The high proportion of respondents in Palestine who felt that the electricity connection would be an issue is likely due to the fact that 94% of youth in Palestine who indicated that virtual jobs would not be feasible for them were based in Gaza, where electricity outages are common.



Assessment of Promising Sectors for Youth Employment

Based on the results of the subject matter expert and key stakeholder interviews, as well as the youth survey, 13 sectors were examined as possible avenues for youth employment during the COVID-19 recovery period. The results of this assessment are summarized below:

ICT Sector and Virtual Jobs: The ICT sector and virtual jobs are particularly promising due to their strategic prioritization by both the GoJ and the PA, as well as the current investments and multilateral-supported projects in the sector. The potential for virtual freelancing to provide employment for vulnerable youth including refugees, women, and youth in Gaza is favorable, though ongoing support should be provided to help them overcome barriers to accessing needed technology as well as stable internet access and electricity. Support could be provided through technology hubs. Youth success in the field will require a focus on skill building that aligns the technical skills of youth with the needs of the market.

Agriculture: The noteworthy focus and investment that the GoJ and its international partners are placing on developing the agriculture sector as a driver of growth indicates that the sector could generate a significant number of jobs for both Jordanians and Syrian refugees in future years, including technology-enabled jobs. In Palestine, the sector will require additional investment and value chain development to connect youth with wage employment opportunities at a large scale.

Food Processing: As a result of government investment, food processing has the potential to generate a significant number of jobs in Jordan in the next few years, including opportunities for self-employment. In Palestine, job growth in food processing will likely require the continued as-

sistance of international aid organizations and the Palestinian Food Industries Union (PFIU) providing critical support for capacity building and employment creation. There is also potential for youth and women to engage in self-employment in the industry.

Digital Advertising and Marketing: An increase in ad spending over the last several years, particularly on social media advertising, underscores the growing importance of this industry in Jordan and Palestine as businesses aim to remain competitive. Digital marketing has the potential to offer both wage and self-employment opportunities in Jordan and Palestine, with notable promise to provide virtual work opportunities for youth in Gaza.

Banking: The resilience of financial institutions in Jordan and Palestine throughout the course of the pandemic suggests that banks will likely continue to demonstrate steady growth in the coming years. The increased demand for online banking and e-payment services will likely create employment opportunities for youth who have ICT and digital skills. However, these jobs are likely to be concentrated in major city centers in Jordan and the West Bank, and primarily offer opportunities for youth who have completed higher education.

Construction: Prospects for youth employment in the construction sector in the next few years are significantly more promising in Jordan than in Palestine. The Jordanian government has prioritized construction as a key component to other elements of its economic growth plan, and the sector offers opportunities for vulnerable Jordanian youth and Syrian refugees, although many jobs are informal. In Palestine, the sector faces key challenges including legal restrictions, limited investment, and restrictions on the import of construction materials to Gaza that may keep the sector from offering substantial opportunities for Palestinian youth in the coming years.



Education and Academia: Advancements in the education and academia sector in Jordan point to the potential for an expansion of job opportunities at schools and in online learning companies. Similarly, in Palestine, the potential for youth engagement in the education and academia sector exists along both traditional and nontraditional routes, though limited investment remains a challenge.

Healthcare: There will be significant potential for youth employment in the healthcare sector in both Jordan and Palestine in the coming years. However, many positions may not be accessible to the most vulnerable youth due to education and skill level requirements and the fact that Syrian refugees are legally barred from working in the healthcare and medical fields in Jordan. In Palestine, the low enrollment capacity of medical schools in both the West Bank and Gaza, barriers to importing medical equipment and technology, and financial challenges in recruiting and retaining staff may create barriers to the sector's long-term growth despite local demand.

Hospitality, Tourism, and Services: Hospitality, tourism, and the wider service sector are likely to begin hiring increasing numbers of employees in both Jordan and Palestine as businesses continue to reopen with the cessation of COVID-19 restrictions. However, there are a number of factors that may prevent these sectors from quickly rebounding and could pose challenges to longer-term growth. These factors include ongoing COVID-related health concerns, shifting regulations surrounding international travel and border control in light of new variants, concerns among prospective tourists regarding regional stability in the MENA region, and social and cultural stigmas against service work.

Manufacturing: In Jordan, the manufacturing sector has the potential to create jobs in a variety of

industries during the COVID-19 recovery, including for refugees and Jordanian women. The garment, textiles, chemicals, cosmetics, and renewable energy industries are likely areas for expansion. In Palestine, the potential for youth employment in manufacturing is more limited given the insufficient level of investment directed toward the sector, restrictions imposed on the free movement of goods, as well as the low wages offered in the sector.

Renewable Energy: Jordan has significant potential to drive economic growth and job creation through the renewable energy industry and to leverage the industry to stimulate economic recovery from the pandemic. However, in order to achieve the goals set out in its Strategy for the Energy Sector, the GoJ will need to strengthen ties between renewable energy and other sectors, increase its capacity to train and employ a renewable energy workforce, and strengthen industry governance efforts.

Palestine faces a more uncertain path toward the creation of youth employment opportunities in renewable energy due to restrictions on land use, limited infrastructure and electricity networks, and limitations in needed finance, technology, and research to drive renewable energy programs. However, opportunities for youth employment in the sector exist in small- and micro-sized renewable energy projects, as well as through entrepreneurship.

Retail: With shifts to more modern retail models, including modern malls and the expansion of e-commerce, there is likely to be an increase in opportunities for youth employment in the sector in both Jordan and Palestine. However, this expansion will be dependent upon the pace of the economic recovery and its impact on consumer spending.



Vocational Fields: There is strong potential for youth employment in vocational fields in both Jordan and Palestine, including for refugee populations in Jordan as well as for youth in Gaza. Although vocational work opportunities are plentiful, implementers will need to address the social stigma associated with vocational education and employment in order to attract more youth to pursue skilled trades.

Entrepreneurship and Self-Employment as a Path to Economic Opportunity

Several local stakeholders and subject matter experts consulted for this report noted that the shortage of jobs in Jordan and Palestine means that entrepreneurship will be an important avenue for youth to pursue in the coming years. The Jordanian government and PA have also made entrepreneurship a key element of their economic growth strategies.¹³

However, an expansion in new business creation will require an improvement in the enabling environment in both Jordan and Palestine. Key areas include the procedures, time, and cost associated with starting a business in both countries, access to finance, and the need for improved training and practical skills acquisition.¹⁴ It is likely that large-scale interventions that seek to address systemic enabling environment challenges, as well as those aimed at entrepreneurial skill building, will be necessary to promote job creation in Jordan and Palestine.

Conclusions & Recommendations

The COVID-19 pandemic created unprecedented public health and economic challenges for governments, businesses, and individuals around the world. The results of this study suggest that despite the difficulty of the COVID-19 period, many in the private sector in Jordan and Palestine are

optimistic about the potential for their businesses to grow over the coming two years, both in revenue and staff size.

The pandemic also created the space for exploring new work modalities through telework at a scale that would have previously been unimaginable. While many in Jordan and Palestine were unable to benefit from this development due to limited technology access and the types of occupations in which they worked, this experience may inform employer perspectives on flexible work arrangements during the COVID-19 recovery and beyond.

As this study has shown, youth and their communities faced negative impacts brought on by COVID-19, including job losses and heightened barriers to securing employment. However, the study findings also highlight the extent to which many youth were already struggling to gain a secure footing in the labor market prior to the pandemic. This was clear from the findings regarding the insufficiency of youth incomes as well as the insecure nature of the employment arrangements of many youth at the start of the pandemic.

Furthermore, the study underscored the relatively greater challenges facing more vulnerable youth and their communities prior to the pandemic, including refugees in Jordan and youth in Gaza. These greater challenges were clear given the lower tendency of these youth to cite COVID-19 as the reason for why they were facing a shortage of job opportunities in the market.

Achieving an equitable outcome to the COVID-19 recovery will require a response that puts youth and vulnerable populations at the center, as they faced the most challenging economic circumstances prior to the crisis and lost the most throughout. These efforts should focus on job quality in addition to quantity, ensuring that opportunities for youth and vulnerable populations offer sufficiently high wages to meet basic needs,



provide access to formal labor contracts and related benefits, and offer stability through unlimited or longer-term contracts.

The following recommendations are intended to guide implementers and funders of youth workforce development programming in Jordan and Palestine as they work to support young people during the COVID-19 recovery. These recommendations may also be of interest to policymakers engaged in planning policy responses aimed at hastening the pandemic recovery in Jordan and Palestine.

Recommendation 1: Youth workforce development programming in Jordan and Palestine should provide targeted, wraparound services for youth alongside soft and technical skills training in order to improve labor market outcomes for vulnerable youth. This may include job placement and mentorship support to help youth navigate initially challenging periods as they first enter the workforce. In both Jordan and Palestine, surveyed youth mentioned technical and soft skills training and assistance in locating job opportunities and connecting with employers as being among the most important services that implementers of workforce development programs should provide. Other forms of support that were particularly in-demand in Palestine included incubator services for start-ups, connections to other young job seekers, and job fairs.

Recommendation 2: Implementers should consider placing an increased focus on technical training involving apprenticeship models for young women in Jordan. Study results indicate that young women in Jordan are significantly more likely than their male peers to feel that technical skills training (71% vs. 53%) and assistance to connect with employers (25% vs. 8%) are important services for young job seekers in their cities. The tendency of female university students in Jordan to pursue studies in the humanities, and the shortage

of job opportunities available that relate to these fields, likely contribute to this increased demand for technical training among young women.

Recommendation 3: Implementers and funders should prioritize youth workforce development programming that involves direct job placement support in order to achieve higher job placement rates. The job placement rate for graduates from EFE's JTP programming, which involves direct job placement support, was significantly higher than the employment rate measured for the entire youth sample, which included a substantial share of youth who had completed other programming types that did not involve direct placement support. Among JTP graduates who completed training during the same period from which the sample was drawn, 63% in Jordan and 87% in Palestine secured employment, whereas 28% of the entire sample of youth in Jordan and 32% in Palestine indicated that they were working at the time of the survey.

Recommendation 4: Youth workforce development organizations should consider completing additional studies in order to identify evidence-based approaches to improve labor market outcomes for youth with disabilities in Jordan and Palestine. Although literature exists on the labor force participation of persons with disabilities in both locations, more work can be done to identify promising approaches that organizations can apply in practice, especially with regard to increasing labor force participation of women with disabilities and ways to effectively engage the private sector in this area. Due to sample size limitations, this study was limited in what it could contribute to this critical discussion.

Recommendation 5: Implementers and funders should consider focusing on technical boot camp models aimed at producing job-ready youth in specific technical areas that are in most demand among local ICT companies, and that could also



be applied in virtual freelancing.

This approach would create the most potential for youth to seek a variety of employment opportunities in the ICT field and would also increase the extent to which youth could distinguish themselves within the highly competitive virtual freelancing space. Given that youth working on virtual freelancing are competing within a global talent pool, skill differentiation will be critical for youth to secure sustainable economic opportunities. This is particularly relevant for youth in Jordan and Palestine who aim to work in markets outside of the MENA region, as they will face competition from markets where the cost of living is lower, and where freelancers can therefore charge lower prices.

A moderate level of English proficiency is typically required to support the pursuit of these types of technical skills. As such, in order to promote inclusion of more vulnerable youth, implementers may consider offering English language training alongside technical boot camps.

Recommendation 6: Implementers and funders should focus on developing virtual freelancing capacity among youth in Gaza given the significant restrictions that exist for other avenues of employment. In Gaza, virtual freelancing presents one of the most promising options for youth economic opportunities. However, implementers should take care to avoid duplication with existing initiatives. Boot camp models, as discussed above, could be promising to prevent an oversaturation of youth working in technical areas that require less training, such as basic graphic design.

Recommendation 7: Implementers and funders should consider technology hub models for virtual jobs that encourage youth to form freelancing teams rather than working in isolation. Local stakeholders noted that many youth lack the

skills to secure contracts from abroad and that there is potential for local firms to secure opportunities and then hire freelancers, rather than youth working independently to secure and deliver on contracts. This approach would provide opportunities for youth to develop their teamwork and entrepreneurship skills, making virtual freelancing jobs move beyond self-employment alone. The technology hubs could also help close the gap in technology access that creates barriers for youth from more vulnerable backgrounds to engage in freelancing opportunities.

Recommendation 8: Additional efforts should be made to increase the level of interest that Jordanian and Palestinian youth have in vocational jobs given their strong potential for creating sustainable employment opportunities. In order to advance youth employment in this area, implementers and funders should prioritize programs and campaigns focused on diminishing negative stereotypes associated with vocational education and employment, and policymakers can work on professionalizing these jobs in order to ensure that workers in vocational positions are treated with dignity. Additionally, implementers and vocational training institutions should partner with private sector companies to offer work-based learning opportunities alongside classroom instruction in order to facilitate trainees' transition to the workforce after completing programming.

Recommendation 9: In Jordan, implementers of workforce development programming should prioritize training youth for jobs in sectors that are expected to grow during the COVID-19 recovery, such as the ICT sector – including virtual jobs – and manufacturing, in addition to vocational fields. Hospitality, tourism and service jobs are also likely to resurge, although near-term growth in these industries is heavily reliant on the course of the pandemic. The agriculture and food processing sectors offer considerable opportunity



for self-employment in Jordan, including for refugee populations.

Recommendation 10: In Palestine, priority sectors for youth workforce development programming should include ICT and virtual jobs, vocational fields, and healthcare. As with Jordan, hospitality, tourism and service jobs are also likely to resurge, but will be subject to developments related to the pandemic. Implementers should follow developments related to the construction industry to determine if local and regional political dynamics offer the potential for job growth. Finally, food processing will offer opportunities for self-employment in both the West Bank and Gaza.

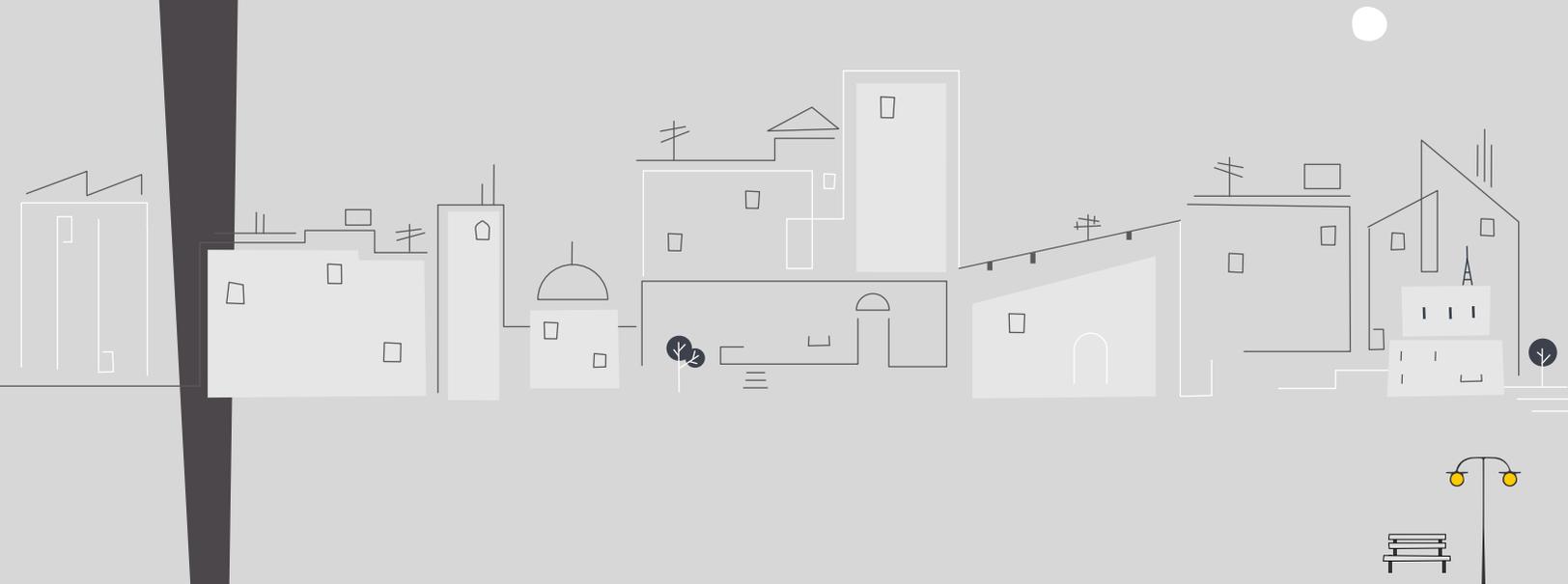
Recommendation 11: Implementers and funders should focus particular effort on integrating women into youth workforce development programming in order to address the long-standing challenge of low women's labor force participation rates in Jordan and Palestine as well as the additional challenges hampering women's employment brought on by the pandemic.

Implementers focused on employment programming for women should seek opportunities to engage them in non-traditional fields such as mobile maintenance and other ICT-driven fields as well as vocational work, while remaining attentive to cultural norms and practical considerations affecting women's job placement and retention. These considerations include, but are not limited to, the need for safe transportation options and the availability of childcare. There is also considerable opportunity for women to generate income through self-employment, although these programs should ensure that new micro-businesses respond to market demand in addition to the skills and interests of young women participants.

Recommendation 12: Implementers should consider working directly with private sector employ-

ers to develop and roll out onboarding programs that help close gaps in the technical and soft skills of youth in order to increase their success on-the-job. Programs of this type would not only benefit youth by bringing their skills into line with market needs, they would also benefit employers through improved employee productivity and retention. Implementers could approach this endeavor through a workshop model that convenes multiple employers in a single engagement or through one-on-one models.

Introduction



The COVID-19 pandemic drastically altered the daily lives of countless individuals across the globe, threatening their health and livelihoods and impacting businesses, supply chains, and government revenues. Jordan and Palestine were not spared from these effects, leading their governments and populations to struggle to gain footing as the resulting health and economic crises ensued. Young job seekers, particularly women, refugees, and youth with disabilities, have been disproportionately affected by the crisis through job losses and heightened barriers to entering the workforce.

The first confirmed case of COVID-19 in Jordan was detected on March 2, 2020. Just days later on March 5, the first confirmed case was detected in Palestine. Since this initial outbreak, nearly 1.5 million cases have been confirmed in Jordan, as have more than 600,000 in Palestine.¹ Despite early successes in limiting the spread of COVID-19, Jordan and Palestine faced significant waves of infections beginning in the latter part of 2020 and continue to grapple with an ever-changing landscape of new variants.

Following the initial outbreaks, the Government of Jordan (GoJ) and the Palestinian Authority (PA) reacted quickly to curb the spread of the virus, instituting movement restrictions, curfews, and limits on public gatherings that varied in severity. These measures, implemented as critical steps to protect public health, led to shrinking private sector revenue and significant job losses, affecting vulnerable populations the most acutely. Both the GoJ and PA made efforts to quickly respond to the resulting economic crisis, with varying levels of success.

The impacts of the pandemic on the Jordanian and Palestinian labor markets brought the existing youth unemployment crisis into sharp relief. In 2019, youth unemployment rates stood at

The COVID-19 pandemic drastically altered the daily lives of countless individuals across the globe, threatening their health and livelihoods and impacting businesses, supply chains, and government revenues

36.8% in Jordan and 40% in Palestine.² These rates have since increased to at least 48% in Jordan and 42% in Palestine.³

The same has been true for the situation of women. In line with trends in many countries, women in Jordan and Palestine have disproportionately assumed responsibility for child and elder care during the pandemic. With added household responsibilities and common sectors for women's employment heavily impacted by the crisis, women's labor force participation worsened following the start of the pandemic, down further from already low pre-pandemic rates.

In addition, the economic impacts of the pandemic have been compounded for youth and women who have intersecting vulnerabilities, including refugees and persons with disabilities. In Jordan, where 1.3 million Syrians have found refuge, permanent dismissals during COVID-19 were nearly twice as common for Syrian men and women as for their Jordanian peers.⁴ Also in Jordan, the employment rate for men and women with disabilities is approximately half that of persons without disabilities.⁵ Only a third of persons with disabilities in Palestine participate in the la-

bor force, and participation is significantly lower for women with disabilities compared to men.⁶

Employing working age young people in Jordan and Palestine is paramount as the region considers avenues for economic recovery in the coming years. If youth and vulnerable populations are able to actively participate in the labor force and find secure employment, they can become major drivers for economic growth. While the pandemic has dampened the ability of the private sector to increase hiring in the short term, it has also directed attention to areas of need as well as opportunities for the coming years.

During the COVID-19 economic recovery period, it will be critical to support the integration of youth, particularly the most vulnerable, into the labor market and prepare them with the needed skills and experience to seize new opportunities in the transformed global economy. Efforts to integrate youth into the labor market may entail varying forms of training in fields ranging from vocational trades to ICT and virtual freelancing. They may also involve the provision of mentoring and job or apprenticeship placement services. Importantly, these efforts will require a focus on guiding

youth toward opportunities in sectors most likely to grow during the COVID-19 recovery. Equipping youth with the competencies needed to adapt and demonstrate resilience in a rapidly evolving job market will greatly facilitate this process.

Efforts to integrate youth into the labor market during the COVID-19 recovery will also benefit from collective action among government, the private sector, and civil society to advance creative approaches to connect the most vulnerable youth with sustainable economic opportunities.

Study Purpose and Structure

The aim of this study is to understand and document the impacts of the COVID-19 pandemic on young people in Jordan and Palestine, with an emphasis on vulnerable youth, and to utilize these findings to formulate concrete recommendations for youth workforce development programming implemented in both geographies during the COVID-19 recovery.

For the purposes of this study, vulnerable populations include refugees, women, persons with disabilities, and youth living in under-resourced areas such as rural communities and communities in Gaza. Women have been included in this definition of vulnerable populations due to the barriers they face to accessing employment beyond those felt by their male peers, in addition to their low labor force participation rates, which, in Jordan and Palestine, are among the lowest in the world.⁷

The study gathered perspectives from graduates of youth workforce development programming delivered in Jordan by Education For Employment-Jordan (EFE-Jordan) and in Palestine by Education For Employment-Palestine (EFE-Palestine).ⁱ It also gathered perspectives from employers op-

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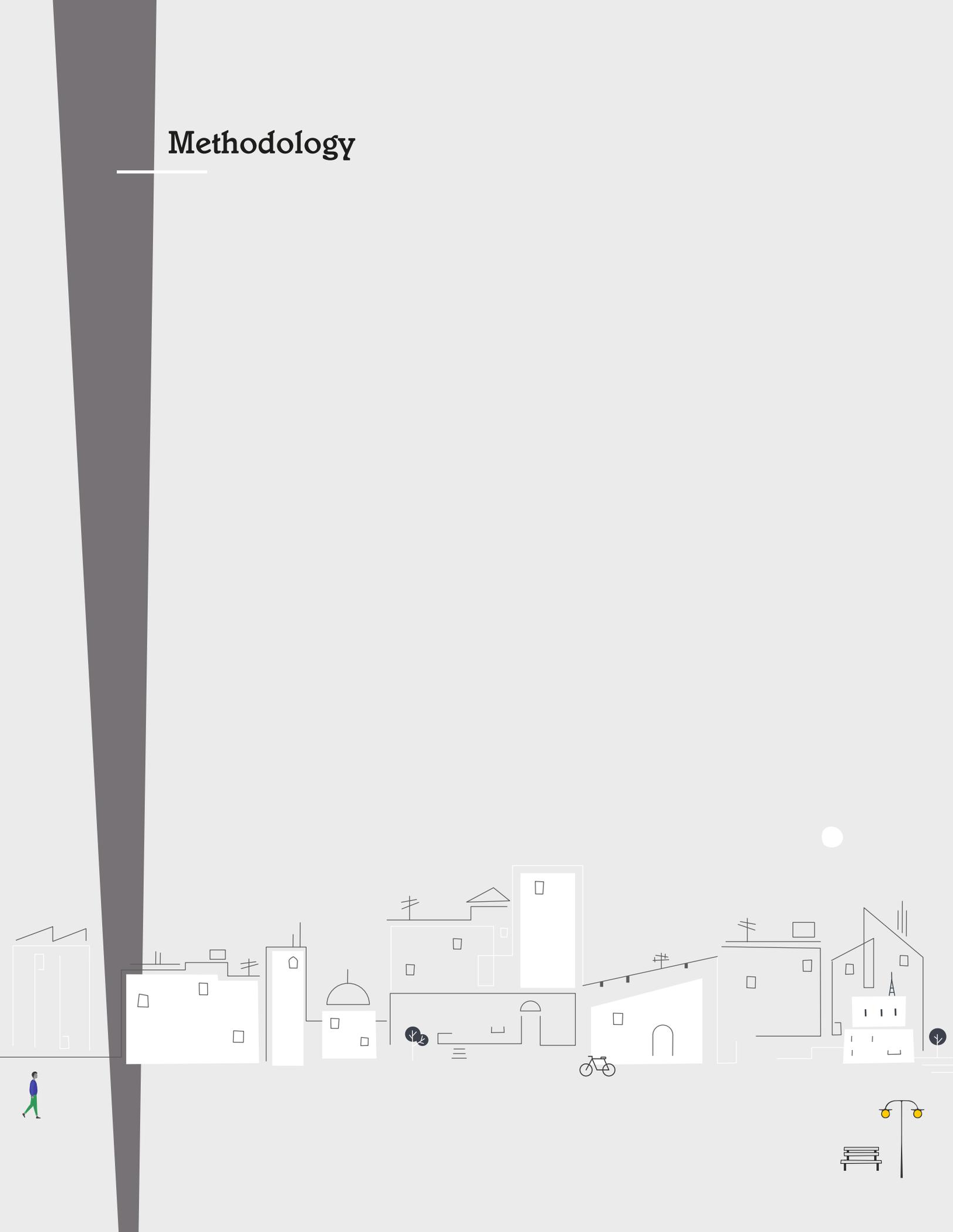
i EFE is a Network of Affiliated organizations that deliver workforce development programming for youth in the Middle East and North Africa (MENA). EFE-Jordan and EFE-Palestine have been working since 2006 to develop the essential, job search, and entrepreneurship skills of youth.

erating in Jordan and Palestine, and experts and key stakeholders from multilateral institutions, bilateral aid agencies, government agencies, implementing organizations, and the private sector. This comprehensive approach ensured that the resulting conclusions and recommendations reflect a broad set of perspectives, and that youth perspectives are placed at the center in informing programming that aims to serve them.

The study is organized into four sections: Methodology, Impacts of the Pandemic on Youth and Vulnerable Populations, Looking Forward: Promising Programming, Skills, and Sectors for Youth, and Conclusions & Recommendations.

The Methodology section provides a detailed description of the mixed methods approach taken for this study, including the survey, interview, and sample selection approaches used. The Impacts section provides an overview of the effect that the pandemic has had on the Jordanian and Palestinian economies, the private sector, and youth, including the most vulnerable. The Looking Forward section analyzes 13 sectors for their potential to provide youth employment opportunities in Jordan and Palestine during the COVID-19 recovery, taking into consideration the impact that vulnerability could have on the ability of youth to access available opportunities. Finally, the study closes with the Conclusions & Recommendations section, which highlights key considerations for implementers and funders of youth workforce development programs in Jordan and Palestine that aim to deliver programming that is responsive to the needs of youth from different backgrounds within the complex environment of the pandemic.

Methodology





This study utilized a mixed methods approach in order to provide a rich understanding of the current and future challenges and opportunities that vulnerable populations face in the labor market in Jordan and Palestine in light of the economic effects of COVID-19. Quantitative data was collected through youth and employer surveys whereas qualitative data was collected through interviews with key stakeholders in Jordan and Palestine and subject matter experts based in Jordan, Palestine, the United States, and Australia. A thorough literature review was also conducted.

Youth Survey

During August and September 2021, the EFE-Jordan and EFE-Palestine teams conducted the youth survey over the phone in Arabic to a stratified random sample of youth who completed EFE-Jordan and EFE-Palestine workforce development programs in the first quarter of 2019 through the first quarter of 2021. The strata applied for Jordan included Jordanian nationals, refugees living in Jordan, and respondent gender, whereas the strata applied for Palestine included residence in the West Bank, Gaza, and East Jerusalem as well as respondent gender. Survey responses were anonymous.

Although the sample is not representative at the national level, sampling from among graduates of youth workforce development programs ensures that the experiences and insights of more vulnerable youth are documented and considered, and that the programming recommendations of the study are relevant for youth who are similar to participants. In addition, the known characteristics of EFE graduates made it possible to extrapolate findings to a sufficient extent as to make them relevant for a wider youth population in Jordan and Palestine.

Phone surveys were used to ensure survey clarity and sufficient response rates. Prior to beginning survey administration, EFE staff informed youth respondents about the aim of the study and explained that their participation was completely optional and that their responses would be anonymous. The survey response rate for youth in Jordan was 48% and for youth in Palestine it was 67%.

The surveys explored a diverse range of topics including:

- youth employment activities
- quality of work currently and at the beginning of the COVID-19 crisis
- changes in working arrangements before and after the COVID-19 crisis
- challenges in finding and retaining employment since the onset of the COVID-19 crisis
- engagement and experiences of youth and their communities in the labor market since the onset of COVID-19
- youth labor market expectations for the next two years
- critical areas for developing youth workforce development services

These topics were chosen to gather insights on youth experiences and knowledge of local needs to support the informed design of future youth workforce development programming.

A total of 814 youth responded to the survey, with 404 responses received from Jordan and 410 from Palestine. Responses were reviewed to ensure that they belonged to individuals within the populations of focus for the study, and those that were determined to fall outside of the target population were removed from the sample for the purpose of this analysis. Ten responses from Jor-



dan were removed because they were collected from youth who were not Jordanian and did not self-identify as refugees, and an additional 13 responses were removed because they were collected from individuals who were more than 40 years old.

In the case of Palestine, it was not possible to secure sufficient responses from East Jerusalem to form statistically valid conclusions, so the 11 responses that were collected from participants residing in the city were removed from the sample for the purposes of this analysis. An additional six responses were removed from the sample because they were collected from individuals older than the age of 40.

Although these responses were removed from the sample that was utilized for the present study, EFE has reviewed these responses separately as a basis for understanding youth experiences in light of the pandemic.

Youth Survey Sample Makeup

The final analysis was conducted on a total of 774 responses, 381 of which were from Jordan and 393 of which were from Palestine.

The share of respondents who belonged to each stratum within Jordan and Palestine reflects the makeup of EFE training cohorts during the sampling period. Statistical significance testing was used to understand the differences in responses between each group and to produce the study conclusions. During the analysis, the youth survey responses were weighted using design weights equal to the inverse of the probability of inclusion of an observation to the sample. Application of the weights allowed for the calculation of unbiased estimators.

Youth Refugee Status

In Jordan, 285 responses were gathered from Jordanians (75%) and 96 responses were gathered from individuals who identified themselves as refugees living in Jordan (25%). Among the respondents who self-identified as refugees, 89 were from Syria (93%), three were from Sudan (3%), three were from Yemen (3%), and one was from Iraq (1%). There was no statistically significant difference in the gender distribution between Jordanians and refugees living in Jordan. Age and educational attainment distributions varied, however. Refugee respondents tended to be older than Jordanian respondents, with 42% of refugee respondents being over the age of 30 compared to just 13% of Jordanian respondents.

As for educational attainment, Jordanian respondents had higher average levels of education than refugee respondents, with 53% of Jordanians indicating that they had earned a university degree or higher compared to 19% of refugees. Additionally, only 4% of Jordanians indicated that they had earned less than a high school diploma, compared to 35% of refugees.

Of the 393 responses gathered in Palestine, 82 were from the West Bank (21%) and 311 were from Gaza (79%). Among all respondents in Palestine, 221 self-identified as refugees (56%), comprising 15% of respondents in the West Bank and 67% of respondents in Gaza. According to the Palestinian Central Bureau of Statistics (PCBS), Palestinian refugees make up 26% of the population in the West Bank and 64% of the population in Gaza.¹ As such, the share of respondents in the West Bank who identified as refugees was lower than the actual population rate whereas for Gaza, the share was nearly in line with population-wide figures. This may indicate that respondents in the West Bank had a lower average level of vulnerability than the overall population in the West Bank,



whereas respondents in Gaza were more in line with the overall Gazan population in terms of vulnerability. UNRWA considers Palestinian refugees to be Palestinians who lost access to their livelihoods and homes during the 1948 conflict.²

In addition, statistical testing indicated that for the sample, respondents residing in Gaza were more likely than their peers in the West Bank to self-identify as refugees. The correlation between refugee status and residence in Gaza, as well as the geographically specific nature of challenges faced by youth in the West Bank versus Gaza supported an analytical approach that disaggregated results from the Palestine sample by residence in the West Bank or Gaza rather than by respondent refugee status.

Youth Gender, Age, and Education

In Jordan, 297 of the 381 respondents were young women (78%). Among the 285 Jordanian nationals who responded to the survey, 229 were young women (80%) and among the 96 participants who identified as refugees, 68 were young women (71%).

In Palestine, 270 of the 393 respondents were young women (69%). Among respondents in the West Bank, 52 out of 82 respondents were young women (63%) compared to 218 of the 311 respondents from Gaza (70%).

Respondents in the sample ranged between the ages of 18-40, with most participants being age 30 or younger (80% in the case of Jordan and 93% in the case of Palestine). There were statistically significant differences in the age distributions of respondents between Jordan and Palestine. Respondents from Palestine tended to be younger on average, with 70% being age 25 or below compared to just 46% of respondents in Jordan (Figure 1).

Respondents in Palestine also tended to have a higher level of education than those in Jordan. In Palestine, 83% of respondents had at least a university-level degree, compared to 45% of respondents in Jordan.

Employer Survey

Employer surveys were conducted online and over the phone in September 2021 using convenience sampling. All surveys were completed in Arabic. The EFE-Jordan and EFE-Palestine teams distributed the employer survey via e-mail to employer associations and to EFE employer partners. They also shared it with their followers on LinkedIn and Facebook. Online self-administration was the preferred method because the survey addressed some topics that employers could find sensitive, and may therefore not wish to discuss with EFE representatives administering the survey over the phone. However, lower than desired survey completion rates in Jordan made it necessary for 18% of responses in the country to be collected via phone. All employer survey responses for Palestine were collected online.

Themes explored in the employer survey included:

- economic impacts of the COVID-19 crisis on respondent companies
- government support received
- teleworking practices
- the presence of vulnerable populations among company staff before and after the onset of the COVID-19 crisis
- company hiring needs and recruitment plans for the next two years
- employer demand for skills

These topics were selected in order to gather a broad understanding of the impacts of the pandemic on the private sector and in particular, how

these impacts are likely to affect youth employment prospects now and in the coming years.

Employer Survey Sample Makeup

In total, 222 employers responded to the survey, with 124 responses collected from Jordan (56%) and 98 collected from Palestine (44%). Within Palestine, 51 responses were collected from the West Bank (52%) and 47 responses were collected from Gaza (48%).

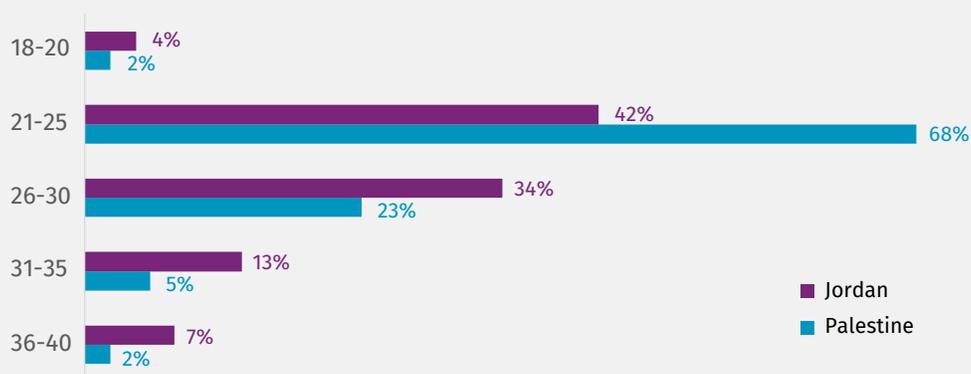
Respondents held a range of position types within their organizations. In Jordan, the most common position type was HR, followed by executive-level management, senior-level management, and mid-level management. An additional 8% of respondents indicated that they held other position types. In Palestine, nearly half of respondents held executive-level management positions, followed by senior-level management, mid-level management, and HR positions. An additional 7%

indicated that they held other types of positions (Figure 2).

Respondent companies were primarily small- and medium-sized enterprises (SMEs), constituting 85% of the sample in Jordan and 83% in Palestine. This is reflective of the private sector environment in both Jordan and Palestine, where SMEs make up 96% and 99% of firms, respectively.³ In particular, the sample included a significant amount of small (between 10-49 employees) and microenterprises (fewer than 10 employees). In Jordan, 31% of participating companies were small enterprises, as were 26% in Palestine. Microenterprises made up 28% of surveyed companies in Jordan and 47% in Palestine. The larger share of companies in the sample from Palestine that are microenterprises is also expected given that the majority of Palestinian companies employ fewer than 20 people.⁴

Employers who responded to the survey operated in a variety of sectors. In Jordan, the most

Figure 1: Respondents in Palestine tended to be younger on average than those in Jordan, and respondent ages in Jordan were more evenly distributed



Source: Youth Survey. N=774 (Jordan: 381; Palestine: 393).

common sector of operation was education and academia, followed by tourism/hospitality, restaurants/catering /food delivery, ICT, and manufacturing.

In Palestine, sectors of operation varied between the West Bank and Gaza. In the West Bank, the most common sectors in which employers operated were banking and finance, ICT, and engineering. In Gaza, sectors of operation were more concentrated than in the West Bank, with the most common sectors being ICT, advertising/marketing/PR, and education and academia (Figure 3).

Surveyed employers in Jordan were more likely than those in Palestine to be operating in the tourism/hospitality, restaurants/catering/food distribution, and retail sectors. Employers in Palestine were more likely than those in Jordan to be operating in the banking/finance, advertising/marketing/PR, and consultancy sectors. In addition, surveyed employers in the West Bank were

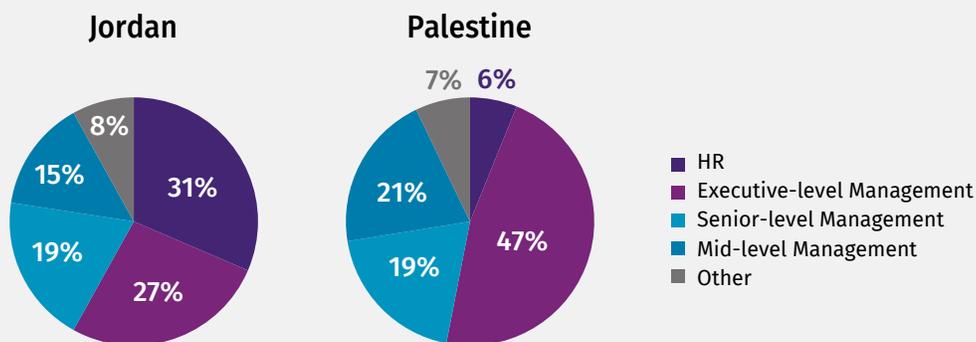
more likely than those in Gaza to be operating in the banking/finance sector, whereas employers in Gaza were more likely than those in the West Bank to be operating in the advertising/marketing/PR sector.

Key Stakeholder and Subject Matter Expert Interviews

Under the study, 31 subject matter experts and key stakeholders were interviewed in order to gather a broad set of perspectives and analyses on the impacts of the pandemic and how they relate to youth opportunities. Interviews were aimed at gathering varying perspectives on a range of topics relevant to the study, including:

- government pandemic responses
- the impacts of COVID-19 on the economy and labor market
- trends in employment opportunities for vulnerable populations since the COVID-19 crisis began

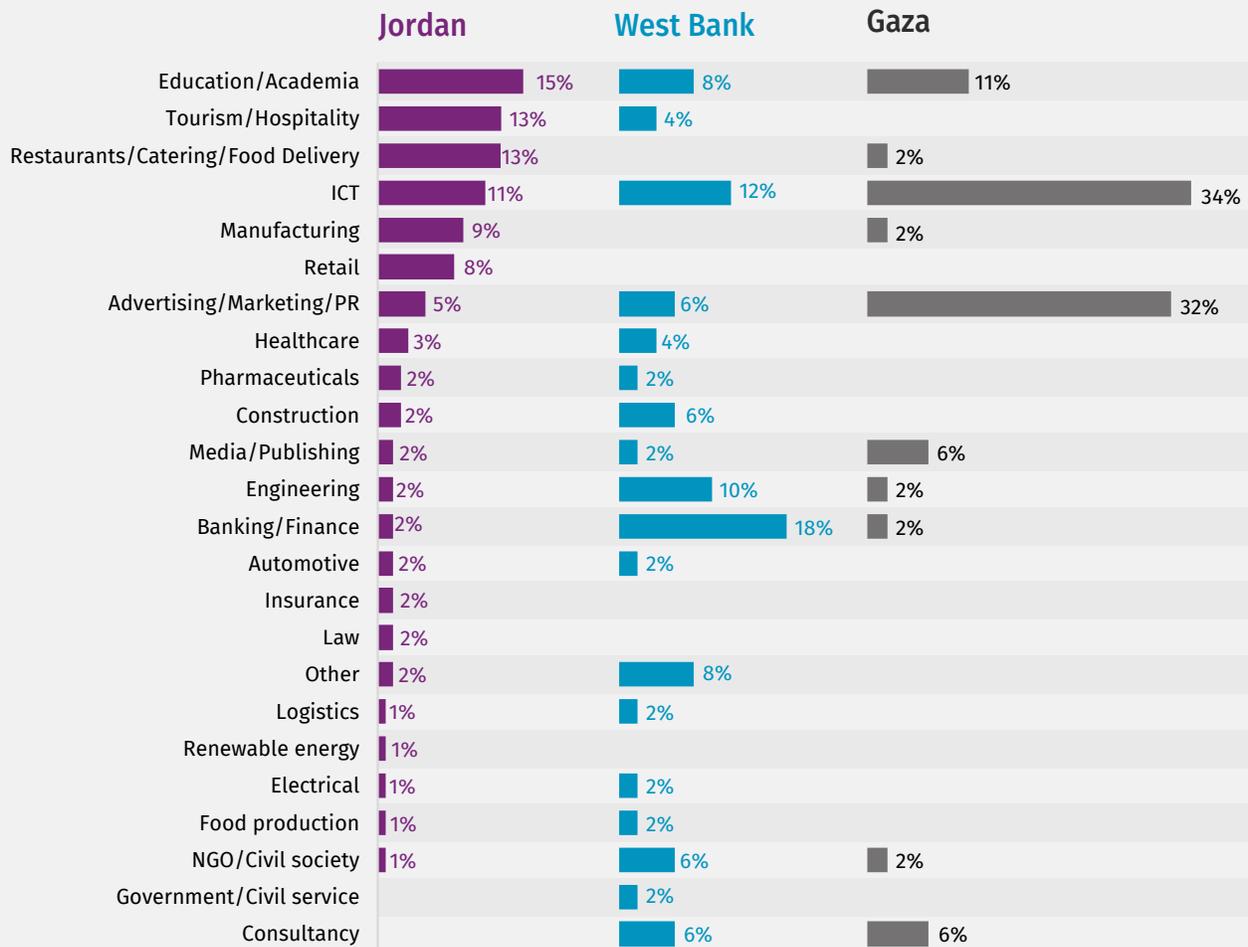
Figure 2: Employer survey sample breakdown by position type



Source: Employer Survey. N=222 (Jordan: 124; Palestine: 98).



Figure 3: Employer survey sample breakdown by location and sector



Source: Employer Survey. N=222 (Jordan: 124; West Bank: 51; Gaza: 47). Results are rounded to the nearest whole number.

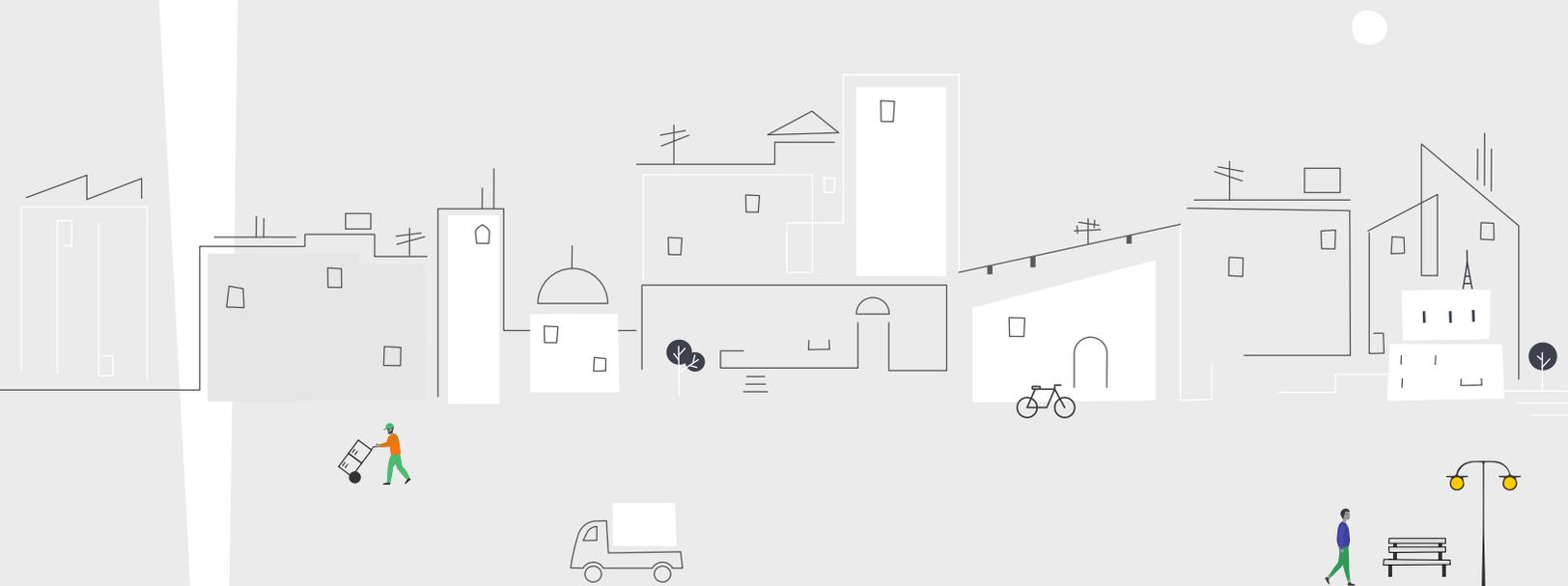


- labor market expectations for the next two years
- the potential of virtual jobs to provide economic opportunities for youth
- the potential role of workforce development organizations to support youth within the current environment

The perspectives of experts and key stakeholders on these key questions provided valuable nuance to what has been written in the literature. The study team drew on these insights in interpreting the results of the youth and employer surveys and in placing them within the larger context of events affecting youth economic participation during the pandemic.



Impacts of the Pandemic on Youth and Vulnerable Populations





The COVID-19 pandemic has exacted a significant toll on the health and economic wellbeing of youth and the wider population in both Jordan and Palestine. The following sections will focus on the impacts that the pandemic has had on businesses as well as on youth and their communities. The bulk of the discussion will center around the results of the employer and youth surveys implemented under this study. GoJ and PA responses to the pandemic are outlined first in order to place the subsequent discussions on the pandemic's economic impacts within the context of contemporaneous government policies intended to minimize those impacts.

Government Responses in Jordan

Following the initial detection of COVID-19 in Jordan, the GoJ reacted swiftly to slow the spread of the virus. On March 17, King Abdullah signed a royal decree activating the National Defense Law, under which subsequent pandemic responses were enacted. The GoJ declared a state of emergency and instituted a complete lockdown and curfews.¹ As part of this initial lockdown, the government closed air and land borders, educational institutions, non-essential public services, and all private businesses. Public religious services were also halted.² In addition to these measures, Jordan focused on contact tracing efforts³ and surveillance testing, achieving testing rates that distinguished Jordan among other middle-income countries in the Middle East and North Africa (MENA) region.⁴

Despite its early success in limiting the spread of COVID-19 as a result of strict lockdown measures, Jordan faced its first wave of infections between September 2020 and January 2021 following the gradual easing of restrictions in the summer of 2020. The peak of the first wave reached more than 36,000 cases per week. Despite the start of a vaccination campaign in January 2021, the country

faced another wave of infections in March 2021, reaching a peak of more than 57,000 cases per week. Jordan recorded its highest case counts of the pandemic in early 2022 as the country battled the omicron variant, reaching a peak of more than 130,000 new cases per week.⁵

Following the initial outbreak, the GoJ issued a series of orders aimed at protecting public health and providing critical support to vulnerable populations, businesses, and employees in both the formal and informal sectors, utilizing a broad set of policy mechanisms to respond to the crisis. Approaches included the expansion of cash transfer programs, wage subsidies, unemployment insurance, prohibitions on terminating employees, food vouchers, price limits for certain food items, in-kind assistance, grace periods for the payment of taxes, advances on withdrawals from social security for some workers, and the creation of an emergency fund to support vulnerable families.⁶

On March 18, 2020, Defense Order No. 1 went into effect, suspending the old age social security contribution for employees in the private sector for a period of 3 months, which reduced the required monthly contribution from 21.75% to 5.25%. The remaining amount was maintained to cover insurance relating to unemployment, maternity leave,

The COVID-19 pandemic has exacted a significant toll on the health and economic wellbeing of youth and the wider population in both Jordan and Palestine



occupational health, and death. In addition, the order stipulated that 50% of contributions paid toward maternity leave would be directed toward cash transfers and in-kind support for vulnerable populations, including the elderly and daily wage workers.⁷ The first round of support was provided to the households of 30,000 vulnerable elderly individuals and day laborers at the end of March 2020.⁸ The order also allowed businesses to pay social security through the end of 2023 via installments.⁹

The Himat Watan Fund was created on March 31, 2020 through Defense Order No. 4 in order to support Jordan's efforts to respond to the pandemic. The fund was created within the Central Bank of Jordan (CBJ) and collected more than JD 100 million in donations from the private sector, individuals, and institutions within the first six months after its creation. The fund was used to support the Ministry of Health (MoH) in the COVID-19 response, including vaccine acquisition, and to support the Ministry of Social Development (MoSD) in providing support to vulnerable families through the Hissab El-Kheir account. As of the fall of 2020, nearly 70% of the funds had been directed toward social assistance, primarily in the form of cash transfers.¹⁰

In the subsequent months, a number of additional initiatives were launched to respond to the economic challenges facing workers and businesses as a result of the health crisis. Defense Order No. 6, instituted on April 8, 2020, prohibited employers from terminating any of their employees while also providing provisions allowing salary reductions of 50% for businesses that were required to halt operations. It also provided businesses the option to withhold pay in the case that the management decided to halt operations, and provided the option to reduce pay by 30% for a period of three months if the business continued operating.¹¹

GoJ Defense Order No. 6 prohibited employers from terminating any of their employees while also providing provisions allowing salary reductions of 50% for businesses that were required to halt operations

Defense Order No. 9, declared on April 16, 2020, outlined wage support and unemployment insurance mechanisms through the Tadamon and Musaned programs, which aimed to support both formal and informal workers.¹² Tadamon 1 programming provided allowances to cover the 50% salary cuts that some employees had experienced following the enactment of Defense Order No. 6, up to a maximum monthly amount of JD 500. Tadamon 2 programming provided an allowance of JD 150 for a period of three months to employees working at informal businesses or those registered with the Social Security Corporation (SSC) for less than a year.¹³

Through Musaned programming, the GoJ provided support to employees working for businesses that halted operations. Musaned 1 programming provided three months of unemployment payments for registered employees and Musaned 2 provided the option for both Jordanians and non-Jordanians to withdraw from their unemployment insurance savings, up to JD 450. Lastly, Musaned 3 allowed individuals to withdraw an advance from their unemployment insurance funds, limited to 5% of their insured income or JD 450. Individuals



who were registered with the SSC and who earned less than JD 500 per month were eligible, including Jordanians, non-Jordanians, and voluntary members.¹⁴

In addition, the Jordan National Aid Fund (NAF) began implementing a cash transfer program designed to benefit day laborers and those engaged in informal self-employment.¹⁵ The programming was supported through the Himat Watan Relief Fund and utilized e-wallets to deliver the transfers.¹⁶ The GoJ also provided support to day wage and informal workers through the Zakat Fund and the Takaful 3 Program, in addition to continuing the delivery of its existing emergency cash transfer program, Takaful 1, with support from the World Bank.¹⁷

Additional in-kind support to vulnerable individuals that included food parcels, medicine, gas, and water were provided through programming administered by the SSC and NAF.¹⁸ As of August 2020, 250,000 Jordanian households were receiving support from NAF within the framework of the government's emergency response, in addition to 185,000 households who were already receiving monthly assistance. Many of the households receiving emergency support were those of daily wage workers who were newly unemployed due to the pandemic.¹⁹

The GoJ enacted Defense Order No. 13 on June 15, 2020 to aid businesses in the tourism sector through the form of soft loans to support business operations, including salaries, flexible payment options for 2019 taxes, and reductions in sales and services taxes. Defense Order No. 14, also issued on June 15, 2020, launched the Himayah Program, which allowed employees registered with the SSC and working in the transportation and tourism sectors to receive a 50% wage subsidy, up to a maximum of JD 400 per month.²⁰ The program was expanded to cover coffee shops

and restaurants in October 2020.²¹

Defense Order No. 14 also launched the Tamkeen 1 and 2 programs, which reduced the required contributions of private sector employees to social security from 21.75% to 13.5% of their incomes (Tamkeen 1) and permitted registered private sector employees with incomes less than JD 700 per month, both Jordanian and non-Jordanian, to withdraw an advance on their insured income up to 5% or JD 200 (Tamkeen 2). Tamkeen 2 was made available to public employees under Defense Order No. 15, which was announced on August 9, 2020.²²

In addition, the Estidama Program was launched through Defense Order No. 24 on December 3, 2020 and provided wage subsidies covering as much as 75% of salaries for workers in the hardest hit sectors, with a total program cost of JD 200 million. The order also expanded the Himayah, Tamkeen, and Musaned programs and continued the suspension of old age insurance. In conjunction with Defense Order No. 24, the government created a JD 20 million Tourism Risk Mitigation and Recovery Fund.²³

A sub-program to Estidama, called Taafi, was launched on August 19, 2021 through Circular No. 42. The Taafi program stipulated that employees of companies selected from among Estidama beneficiaries would receive their complete wages between August through December 2021 through the provision of a 30% wage subsidy paid by the Estidama program. The remaining 70% of employee wages would be paid by the employer, which must be a company working within a sector that was highly impacted by the pandemic or that was not permitted to operate.²⁴ The GoJ later expanded private sector wage subsidies to cover 50% of the salaries of recent university graduates working for firms in the IT and digital sectors, for a period of six months.²⁵



In addition to these programs, the CBJ implemented a number of measures in March 2020 aimed at supporting the economy during the pandemic. These measures included reducing interest rates by a total of 1.5 points, allowing loan restructuring for companies and individuals, allowing the postponement of loan payments by companies as well as housing and credit card payments for individuals, and injecting more than 550 million JD into the economy, as well as others.²⁶ The GoJ also offered low-interest loans to SMEs through the CBJ in order to support their continued operation. As a condition for receiving the loans, the SMEs were not permitted to reduce staff size throughout the loan duration.²⁷

Support programs were not equally available to all businesses. In order to apply for support, businesses had to formalize, meaning that they needed to register with the SSC. However, many informal small and microenterprises declined to register due to fear of inspections, enforced formalization, and taxation.²⁸

In February and March 2021, the ILO, UNDP, and Fafo surveyed 2,039 enterprises in Jordan about the impacts of the pandemic on their businesses and their ability to secure support from government programs. The study found that only one in ten businesses were receiving government support at the time and that medium and large companies were significantly more likely to be benefiting compared to small and microbusinesses, as were businesses based in Amman compared to those in other governorates. In addition, businesses that had higher levels of profitability prior to the pandemic and businesses that were older were more likely to be receiving benefits. There was also variation in the firms that received benefits according to geographical location as well as among sectors and even segments within a given sector. Among businesses that did receive government support, the majority received wage subsi-

dies or a reduction or deferral of payroll taxes.²⁹

Most of the local stakeholders and subject matter experts consulted for this report felt that the Jordanian government performed as well as could have been expected in response to COVID-19 given its limited resources and the unprecedented nature of the pandemic. As previously noted, the strict lockdown that the GoJ imposed during the early stages of the pandemic was very successful in preventing the spread of the virus while it was in effect. In addition, one interviewee noted that the GoJ had taken care to include refugees and its migrant population in all of its planning around the COVID-19 response alongside Jordanian nationals, including in vaccine provision.

Experts and key stakeholders interviewed for this report generally believed that these defense orders were well intentioned and designed with the aim of protecting workers in Jordan. However, many also felt that the orders had some unintended consequences that led to adverse impacts for the business community, which ultimately had negative ramifications for workers. For example, some interviewees noted that Defense Order No. 6, which prevented employers from laying off staff during the pandemic, resulted in a number of business closures as companies found it untenable to continue paying salaries and other fixed costs while facing a sharp and prolonged decrease in revenue. Some interviewees also noted that a number of businesses found loopholes and other ways around this directive, leading many formal workers to lose their jobs regardless of the orders.

Many of the key stakeholders and subject matter experts noted that the coverage of social protection programming during the pandemic has been limited for informal workers. The SSC's Bader campaign, launched in August 2020, aimed to increase the coverage of these programs by allow-



ing businesses to register retroactively. As part of this initiative, fines were waived that would have otherwise been levied against businesses for being unregistered. It is estimated that by August 2020, 14,500 businesses had registered in order to benefit from support programming, constituting an increase of 25.2% in the number of registered businesses compared to 2019.³⁰ However, as noted previously, many informal businesses were reluctant to register even under these circumstances.

In addition, some experts and key stakeholders noted that reducing social security contributions and borrowing against retirement funds may put workers' future pensions at risk. In a report on Jordan's social protection measures during the crisis, the Jordan Strategy Forum and UNICEF noted this concern, in addition to remarking that the significant cost of the programs managed by the SSC could impact its liquidity, which would be problematic if another crisis were to occur during or immediately after the pandemic.³¹

However, there is reason to believe that the GoJ efforts as a whole helped cushion the impacts of the pandemic on the overall economy. According to a World Bank assessment, the 1.6% GDP contraction that Jordan experienced in 2020 was relatively small when compared to other countries and was made possible through the government's fiscal and monetary response.³²

Government Responses in Palestine

Immediately following the detection of the first case of COVID-19 on March 5, 2020, the PA declared a state of emergency and then instituted a lockdown on March 22. Measures included the closure of universities, schools and non-essential facilities, movement restrictions between governorates in the West Bank, and a request for West Bank residents to remain at home for 14 days ex-

Immediately following the detection of the first case of COVID-19 on March 5, 2020, the PA declared a state of emergency and then instituted a lockdown on March 22

cept for emergencies and essential activities.³³ A curfew was also instituted in the West Bank for a period of 14 days. In addition, quarantine centers were established in both the West Bank and Gaza to host individuals infected with COVID-19.³⁴

This immediate and significant response to early cases of COVID-19 was effective in limiting transmission during the initial months of the pandemic. However, the first wave of infections began soon after restrictions were completely lifted on May 25, 2020, with new weekly cases numbering in double digits. Following the first wave, cases surged in a second wave that brought weekly case counts into the thousands. In response to the worsening health crisis, the PA instituted a lockdown from July 3 to July 13, 2020, but eased restrictions thereafter.³⁵

Following these initial waves of infection, Palestine experienced additional waves in the winter of 2020 and the spring and late summer of 2021 that brought weekly case counts to peaks between 16,000 and 17,000. With the spread of the omicron variant, Palestine recorded its highest case counts of the pandemic in early 2022, reaching more than 58,000 cases in one week.³⁶

Following the outbreak of COVID-19 in the West



Bank, Prime Minister Dr. Mohammed Shtayyeh formed the Emergency Command Center that operated with the support of regional, multilateral, and inter-ministerial committees. The PA also released a COVID-19 response plan in late March 2020 that emphasized its commitment to responding proactively to the pandemic using evidence-based approaches. The plan also delineated the PA's proposed pandemic response, highlighted areas where international support was needed, and outlined the likely impacts that the pandemic could have on Palestine in the long term.³⁷

The pandemic response outlined in the plan was predicated upon preparation, containment, and communication. The PA had already begun emergency preparedness efforts in February 2020, drafting an emergency response plan and working to train medical professionals, prepare medical facilities, and provide needed supplies. Efforts to support containment focused on movement restrictions, quarantining, testing, and contact tracing. Communication efforts focused on distributing accurate information via traditional and social media and on providing situation updates via a COVID-19 tracking dashboard.³⁸

In addition to these public health efforts, the Palestinian Monetary Authority (PMA) took the steps within its power to respond to the economic impacts of the pandemic. It requested that banks allow some account holders to complete account overdrafts and provide four-month repayment grace periods to borrowers.³⁹ Six-month grace periods were extended to businesses operating in the tourism and hospitality sector.⁴⁰ In addition, the PMA offered low-interest loans to support businesses. In the absence of control of its own currency, the PMA drew on its reserve in an attempt to maintain liquidity.⁴¹ The World Bank has noted that the lack of a national Palestinian currency to enable monetary policy measures meant

Although there have been multiple plans drafted to guide the COVID-19 response and recovery in Palestine, funding shortfalls have constituted a barrier to success

that there was no cushion for the Palestinian economy against the effects of COVID-19.⁴²

In addition to these measures, early on in the pandemic, the Ministry of Agriculture (MoA) distributed agricultural supplies including fertilizers and fodder in Gaza and seedlings for home gardening in the West Bank. The MoSD distributed monthly digital food vouchers in the amount of USD 10.30 per capita during the first few months of the pandemic to 65,000 beneficiaries in both the West Bank and Gaza. The MoSD also provided a one-time cash-based transfer to 100,000 vulnerable families in Gaza in the amount of USD 100. Food baskets and digital food vouchers were also distributed to at least 15,000 refugee households in the West Bank.⁴³

The PA also negotiated a tripartite agreement on March 16, 2020 between the government, the Palestinian General Federation of Trade Unions, and other private sector representatives to mitigate the impacts of the lockdown on Palestinian workers in the restaurant, hotel, tourism, retail and wholesale, and manufacturing sectors, as well as others. Under the commitment, employers agreed that they would pay at least 50% of all workers' wages during March and April 2020, that they would pay the remaining wages after the lock-



down was eased, and that in exchange for this flexibility, they would not lay off workers.⁴⁴

While limited data exist as to whether employers fulfilled their commitment within this agreement, the ILO has noted that social media commentary indicated that employers did issue wages, at least during the first month.⁴⁵ Subject matter experts and key stakeholders consulted for this report noted that the PA attempted to extend this pact into May 2020 but was unsuccessful in coming to an agreement with the private sector employers. This was also noted in ILO literature.⁴⁶ Interviewees noted that in the absence of further agreements, many employers either laid off workers or decreased salaries in order to cope with the effects of the worsening economic situation on their businesses.

Many experts and key stakeholders consulted for this report noted that the PA was hindered in its ability to respond adequately to the COVID-19 pandemic due to legal constraints around its areas of control as well as a lack of financial resources. Interviewees noted that the PA was not able to enforce lockdowns or social distancing measures throughout the majority of the West Bank given that its geographic control is limited to only Areas A and B, as Area C is under Israeli control. Experts also noted that these legal restrictions and the fragmentation of authority impacted the COVID-19 vaccine rollout in 2021, as there was disagreement between the PA and the Government of Israel (GoI) regarding which of the two was responsible for providing vaccines to Palestinians in the West Bank and Gaza.

The Palestinian COVID-19 Response Plan makes clear that the PA was aware of the key limitations it would face in responding to the pandemic. In the plan, the PA noted that it does not control its borders, would have a very limited ability to mount a pandemic response in Gaza due to the blockade,

could not borrow money as a state from multilateral institutions, and could not leverage monetary policy mechanisms. The PA also expressed concern about the fiscal crisis and likely impacts that the pandemic and related infection control measures could have on the economy, noting that the economic loss from the pandemic could reach \$2.8 billion. It also projected a 40% drop in government revenues resulting from COVID-19 and noted that this would have a significant impact on its ability to maintain adequate service provision and would create a setback in the eventual economic recovery.⁴⁷

In response to these limitations, the PA appealed for international support in the form of diplomatic engagement as well as funding to support the public health response, provide budgetary support for the PA and the anticipated economic recovery plan, and to provide aid for Palestinian refugees.⁴⁸ The ILO has noted, however, that although there have been multiple plans drafted to guide the COVID-19 response and recovery in Palestine, funding shortfalls have constituted a barrier to success. The ILO added that the situation was further complicated by the suspension of clearance revenues from Israel that occurred in May through November 2020, as these revenues cover the majority of the PA budget.⁴⁹

Given these resource constraints, the PA turned to the private sector early on in the pandemic to help gather needed financial support through the Wakfet Izz Fund, which was created on April 4, 2020 under the auspices of the Office of the Prime Minister.⁵⁰ Multiple experts and key stakeholders consulted for this study noted that the fund was the main initiative in Palestine that was organized to support vulnerable populations after the outbreak of the pandemic.

The fund set out to collect a minimum of USD 30 million in donations from the private sector and



The economic impacts of COVID-19 have been significant for Jordan and Palestine and have compounded challenges that existed prior to the start of the pandemic, including fiscal crises and high unemployment rates

individuals within and outside of Palestine in order to support the provision of general medical services and to assist vulnerable Palestinian families under the auspices of the MoH and the MoSD. The fund's board of directors was comprised of 30 businessmen at the time of its first meeting on April 6, 2020, clearly signaling the leadership role of the private sector in the pandemic response within Palestine. At the time of the fund's launch, the planned course of action was to distribute the collected funds the last week of April 2020.⁵¹ However, media reports indicate that fund distribution continued well into 2021.⁵²

Economic Impacts of COVID-19

The economic impacts of COVID-19 have been significant for Jordan and Palestine and have compounded challenges that existed prior to the start of the pandemic, including fiscal crises and high unemployment rates that threatened the economic wellbeing of their populations.

The following sections provide an overview of the impacts that COVID-19 had on the Jordanian and Palestinian economies, and seek to place these

impacts within the context of the conditions that pre-dated the pandemic.

Economic Impacts of COVID-19 in Jordan

As referenced previously, the Jordanian government responded to the onset of COVID-19 by imposing a swift and restrictive lockdown across the country. While it was largely effective in preventing the spread of the virus during the early stages of the pandemic, the lockdown had significant adverse effects on the Jordanian economy, which was already suffering from high unemployment and other structural issues prior to the pandemic.

Prior to the pandemic, the Jordanian economy was characterized by strong services, hospitality, and industrial sectors as well as increasing exports and declining imports.⁵³ However, the country's real GDP growth rate remained stagnant at or around 2% in the years leading up to the COVID-19 crisis,⁵⁴ foreign direct investment (FDI) and remittance flows were weak, and the fiscal deficit was on the rise.⁵⁵

Employment and labor force participation rates were already low in Jordan before the pandemic, especially among youth and women.⁵⁶ Immediately prior to the pandemic, unemployment for the general population in Jordan stood at 16.8% and the labor force participation rate stood at 41.8%. The situation was even more challenging for women and youth, for whom unemployment rates reached 23.9% and 36.8%, respectively, and labor force participation rates reached 15.6% and 25.8%, respectively.⁵⁷

Some of the issues that contributed to pervasively high youth unemployment rates in Jordan include the mismatch between the skills taught by educational institutions and those demanded by the labor market, the country's insufficient levels of



Following the start of the pandemic, unemployment increased most significantly amongst Jordan's youth and blue-collar workers

growth and job creation to meet the needs of its young population, and a shortage of high-quality programs that support the school-to-work transition for youth, including vocational training and career guidance.⁵⁸ Local stakeholders and subject matter experts consulted for this report believed that while the surge in Jordan's unemployment rate during the pandemic would presumably decrease as the economy recovers, the pre-existing structural challenges causing high unemployment prior to COVID-19 would likely endure beyond the pandemic.

Interviewees explained that Jordan's traditional reliance on foreign migrant labor in some sectors has further complicated this challenge, as many of the jobs available in the labor market are not attractive to the Jordanian population, and there is a significant mismatch between the types of available jobs and the interests and skillsets of unemployed Jordanians. The influx of refugees from Syria and other neighboring countries over the past decades has also exacerbated the challenge of creating enough opportunities to meet the needs of both refugees and host communities in Jordan.

As a result of the pandemic, Jordan has seen significant impacts to its GDP, which was down 1.6% in 2020.⁵⁹ The tourism sector, a key source of employment opportunities for the country, experienced revenue decreases of more than 75% in 2020 compared to 2019.⁶⁰ Export and im-

port growth both contracted significantly in 2020, down 35.8% and 18.2%, respectively. In addition, unemployment rates rose, reaching a staggering 25% for the general population, 28% for women, and 48% for youth in the first quarter of 2021.⁶¹

The World Bank expects that GDP growth will average only 2.3% once economic recovery has been achieved.⁶² Given the World Bank's statement prior to the pandemic that at least 6% annual GDP growth would be necessary to bring employment to normal levels, this estimate bodes poorly for Jordan's future job creation prospects.⁶³

Following the start of the pandemic, unemployment increased most significantly amongst Jordan's youth and blue-collar workers. Local stakeholders noted that new entrants to the labor force were often the first employees to be laid off by companies, which led to significant job losses among youth. While many white-collar professionals were able to transition to working remotely throughout the pandemic, the majority of blue-collar jobs relied on in-person labor that could not take place during lockdowns.⁶⁴

While the surge in Jordan's unemployment rate during the pandemic will presumably decrease as the economy recovers, the pre-existing structural challenges causing high unemployment prior to COVID-19 will likely endure beyond the pandemic



Furthermore, more than 40% of Jordan's labor force is estimated to be in the informal sector,⁶⁵ which posed a multitude of challenges in providing economic support and social services for this population, as noted above. This population also faced challenges when the Jordanian government initially began loosening its lockdown restrictions, as only workers employed in registered businesses deemed essential were granted mobility permits to commute to work.⁶⁶

Jordanians working in the public sector were not as heavily impacted by COVID-19, as they were able to maintain their positions and salaries throughout the pandemic. However, the GoJ did defer wage increases for public sector employees that had originally been scheduled for 2020.⁶⁷

Economic Impacts of COVID-19 in Palestine

Subject matter experts and local stakeholders consulted for this study emphasized the debilitating effects that COVID-19 has had on the Palestinian economy and labor market. They also highlighted the impact that existing economic and political challenges had on reducing the ability of the PA to respond to the crisis. Interviewees stressed that the PA was facing a dire fiscal situation in early 2020 due to prolonged delays in the transfer of clearance revenues from Israel. According to the World Bank, in the lead up to the pandemic, clearance revenues constituted 65% of annual revenue for the PA.⁶⁸ This meant that the suspension of these revenues significantly strained PA resources.

Facing a shortage of crucial funds, the PA imposed austerity measures prior to the pandemic, including implementing an emergency cash management plan that involved paying only a percentage of salaries to public employees, building up arrears to suppliers for goods and services, and

reducing social assistance programs and public spending.⁶⁹

Additional challenges to the Palestinian economy that predate the pandemic include difficulty in obtaining capital and crucial production inputs, including those that Israel considers dual use (i.e., potentially having both civilian and military applications). These items include spare parts, chemicals, medical operating equipment, and electro-domestic appliances. The shortage of these products has slowed productivity growth in the manufacturing, agricultural, dairy, and pharmaceutical sectors.⁷⁰

In 2020, the pandemic led 14% of employees in Palestine to be absent from their jobs, totaling 137,600 people

Restrictions on the movement of workers and goods further limit the productive capacity of the Palestinian economy. These factors, combined with the significant limitations placed on the PA's control of natural resources and the lack of a national currency, have limited economic resiliency and reduced the PA's ability to respond effectively to economic shocks.⁷¹ In addition, the Palestinian economy was also facing challenges related to reductions in foreign aid and eruptions of violence prior to the pandemic.⁷² These factors led real GDP to grow by less than one percentage point in 2019, with growth averaging only 1.15% in the West Bank and near zero in Gaza.⁷³

Most interviewees acknowledged that the initial lockdown instituted by the PA was successful in



responding to public health concerns at the beginning of the pandemic, but also noted that it resulted in widespread economic consequences that permeated all levels of Palestinian society. Local stakeholders and subject matter experts described a domino effect in which lower business revenues, as a result of reduced consumer demand during lockdowns, led Palestinian businesses to decrease salaries or lay off staff. The resulting drops in individual incomes further decreased demand, placing additional cash flow constraints on businesses.

Experts and key stakeholders consulted for this report noted that many companies that relied on having an in-person presence of employees and customers, such as those in the hospitality and service sectors, faced a precipitous decline in demand and revenue. This was particularly the case for SMEs, whose limited cash reserves made them particularly vulnerable to the pandemic's economic shocks. Within this environment, many smaller businesses have struggled to survive the pandemic or have been forced to shut down completely, and some were unable to cover the costs associated with making the health and safety adaptations that COVID-19 necessitated in order to continue operating. In total, economists estimate that there was a net loss of 121,000 jobs in the Palestinian labor market, most of which were directly related to COVID-19 social distancing regulations.⁷⁴

These factors led to considerable impacts on the Palestinian labor market. The PCBS Labour Force Survey Results revealed that in 2020, the pandemic led 14% of employees to be absent from their jobs, totaling 137,600 people. The survey also recorded a drop of three percentage points in labor force participation rates in Palestine from 44% in 2019 down to 41% in 2020. The largest decrease was recorded in Gaza, where labor force participation rates dropped from 41% in 2019 to

35% in 2020, compared to a smaller drop of 46% down to 44% in the West Bank over the same period. The report notes that the drop in labor force participation rates explains why unemployment rates did not increase precipitously between 2019 and 2020 (25% and 26%, respectively).⁷⁵

However, PCBS also noted that unemployment rates varied significantly by governorate. The highest unemployment rate was recorded in the Dier Al-Balah Governorate in the Gaza Strip, reaching 53%. In the West Bank, the highest unemployment rate was recorded in the Bethlehem Governorate, reaching 25%.⁷⁶ The PCBS Labour Force Survey also found that young graduates between the ages of 19-29 who hold at least an associate diploma had the highest unemployment rates, reaching 54% in 2020, up from 52% in 2019. In addition, unemployment rates for young women among this population were higher than for young men, reaching 69% and 39% in 2020, respectively.⁷⁷

Experts and key stakeholders emphasized that vulnerable Palestinians, including those from lower socioeconomic backgrounds and those working in the informal economy, were the most acutely impacted by the economic downturn caused by COVID-19. Interviewees noted that most Palestinians from vulnerable populations are employed within smaller and family-owned businesses, which faced more significant challenges due to cash flow interruptions than larger businesses that had more reserves.

The informal sector employed 57% of workers in Palestine in 2019 – 59% in the West Bank and 51% in Gaza. Informal workers lack employment contracts that protect their rights, which meant that at the start of the pandemic, a significant share of these workers in Palestine lost their sources of income without recourse. Individuals employed informally were unable to access to the partial compensation that was negotiated for workers



under the brief tripartite agreement between the government, employers and trade unions during the spring of 2020.⁷⁸

Subject matter experts and key stakeholders further emphasized that Palestinian workers who retained their jobs were also adversely affected by the pandemic. The ILO estimates that only approximately 12% of workers in Palestine were able to transition to remote work and retain their usual pay, most of whom were in the IT and education sectors or worked for international or non-governmental organizations.⁷⁹ In addition, many workers faced reductions in hours.⁸⁰ Subject matter experts and key stakeholders noted that formally employed private sector employees who were unable to work from home were generally required to take vacation time or unpaid leave for lockdown days due to a lack of protections for these types of contingencies in their contracts. Additionally, interviewees noted that many staff who remained employed experienced an increased workload in order to compensate for staff members who were laid off and not replaced.

COVID-19 in Gaza

The challenges brought on by COVID-19 have been even more acute in the Gaza Strip, which has existed in strict isolation for the past 15 years. With approximately 2.1 million people living in Gaza, the high unemployment rate and inability to access vital supplies have created a dire humanitarian situation made worse by periodic hostilities. From May 10 through May 21, 2021, Gaza experienced another round of conflict that resulted in an estimated \$290-380 million in damages.⁸¹ The results of the *Gaza Rapid Damage and Needs Assessment*, produced by the World Bank, the EU, and the UN predicted that the unemployment rate in Gaza would reach more than 50% by the end of 2021, up from 48% in the first quarter of the year.⁸²

Many experts and key stakeholders interviewed for this study found it more challenging to estimate the economic consequences of the COVID-19 pandemic on Gaza than on the West Bank. They noted that the dire nature of the pre-pandemic situation in the Gaza Strip, along with the damages resulting from the May 2021 hostilities, made it difficult to isolate the effects of the pandemic on the local economy. Some interviewees noted that businesses in Gaza were more accustomed to dealing with economic shocks and crises than those in the West Bank, so in many cases they were able to be more flexible in the face of the pandemic.

Due to its isolation, Gaza was less affected by the early waves of infection than the West Bank, and therefore did not feel the worst public health and economic impacts of COVID-19 until later on in the pandemic.⁸³ The government in Gaza had imposed a total lockdown for a short period of time at the beginning of the pandemic, followed by a partial lockdown.⁸⁴ Although the Gaza Strip was hardest hit by COVID-19 in late 2020 and in 2021, the government in Gaza was hesitant to impose a full lockdown during that time due to the social and economic ramifications that would result from the measures.⁸⁵

Due to its isolation, Gaza was less affected by the early waves of infection than the West Bank, and therefore did not feel the worst public health and economic impacts of COVID-19 until later on in the pandemic



It is clear that the combined effects of COVID-19 and the May 2021 conflict had a profoundly negative impact on the livelihoods of many Gazans. As noted above, unemployment rates among the general population and, in particular among youth, increased significantly. For Gazans who remained employed throughout the pandemic, key stakeholders noted that frequent electricity and internet outages caused disruptions for remote workers. According to PCBS, approximately 63% of the population in Gaza is now receiving social assistance due to poverty.⁸⁶ Furthermore, humanitarian organizations were forced to shift aid that was initially intended to go to those affected by COVID-19 toward supporting those impacted by the May conflict. These efforts have been further complicated by the fact that aid resources have been very constrained as a result of the widespread economic downturn and need on a global level.⁸⁷

Palestinians Working Inside Israel and Israeli Settlements

In addition to Palestinians who lost their jobs in the West Bank and Gaza, those who worked inside Israel were heavily affected during the early stages of the pandemic due to the border closures imposed as a public health measure. At the time that the pandemic began, 133,000 Palestinians were employed in Israel and Israeli settlements, according to PCBS, generating an estimated 15 to 20% of Palestine's GDP.⁸⁸ After the start of the crisis, workers could not travel in and out to earn wages on a daily basis as they had previously, resulting in large-scale job losses for those who were not able to arrange accommodations within Israel through their employers.⁸⁹

Due to these constraints, the number of Palestinian workers in Israel during the early stages of the pandemic dropped significantly, falling to an estimated 45,000 by April 2020.⁹⁰ However, by the end

of 2020, these numbers had nearly rebounded to pre-pandemic levels, reaching 125,000 workers. The remaining gap was mainly accounted for by reductions in the number of Palestinians employed in the construction and agricultural sectors, as well as reductions in the participation of Palestinians over age 50.⁹¹

Furthermore, approximately 60,000 additional Palestinians worked without documentation in Israel prior to the pandemic,⁹² further compounding the number of workers who were affected by the closures. The uncertainty surrounding these figures makes it challenging to determine the full impact of the pandemic on the Palestinian economy stemming from reductions in jobs for Palestinians in Israel and Israeli settlements. What is certain, however, is that the large number of individuals who were not able to continue working in these jobs faced significant economic consequences, as did their households.

Impacts of COVID-19 on Business

As referenced above, the pandemic has had a significant impact on business revenues as well as the ability of businesses to retain staff and pay salaries. The availability of job opportunities is critical for advancing youth economic opportunities, so it is important to understand how businesses are faring, in addition to understanding their likelihood of hiring during the next couple of years.

In line with the existing literature on the impacts of the pandemic on the private sector, the employer survey conducted under this study found that the majority of companies experienced negative impacts on their businesses as a result of the pandemic. In Jordan, 56% of surveyed firms indicated that they had experienced reduced demand for their products or services as a result of the pandemic, as had 51% in Palestine. In ad-



dition, 43% of surveyed firms in Jordan and 51% in Palestine experienced temporary shutdowns. Nearly one-third of employers surveyed noted that they were affected by government restrictions on their business operations. There were no statistically significant differences between the impacts that employers in Jordan and Palestine or the West Bank and Gaza experienced as a result of the pandemic (Figure 4).

Some employers in Palestine provided additional commentary on the variety of impacts caused by the pandemic, noting rising costs of transportation, the difficulty and cost of getting materials across the border, decreased purchasing power within Palestine, and the impact of employee illness on companies.

For some employers, COVID-19 had either no impact or a positive impact on their operations. Among employers surveyed, 7% in Jordan and 13% in Palestine reported that they were not affected by COVID-19. Some employers also reported an increase in demand for their products or services during the pandemic, reaching 15% of surveyed employers in Jordan and 19% in Palestine. Those that indicated that they were not affected tended to be in sectors that were able to transition to telework, such as advertising/marketing/PR, banking/finance, consultancy, education/academia, and ICT. Employers operating in these sectors were also represented among companies that indicated they had experienced increased demand, as were healthcare, food production, non-governmental organizations (NGOs)/civil society, and others.

Employers in Jordan and Palestine were optimistic about company revenue growth over the next two years, with those in Palestine being the most so. In Jordan, 73% of employers surveyed believed

Employers in Jordan and Palestine were optimistic about company revenue growth over the next two years, with those in Palestine being the most optimistic

that it was likely or extremely likely that their company revenue would increase over the next two years, and only 12% felt that it was unlikely or extremely unlikely.

In Palestine, 83% of employers believed that it was likely or extremely likely that their revenues would increase. In addition, employers in Palestine were nearly three times as likely as those in Jordan to indicate that an increase in their company's revenue over the next two years was extremely likely. Only 9% felt that an increase in revenue was unlikely. There was no statistically significant difference in responses between the West Bank and Gaza (Figure 5).

The optimism of surveyed employers is notable given the challenging circumstances that affected businesses after the start of the pandemic. They may believe that the worst of the pandemic has passed, and that there will be better days ahead. Yet, with 15% of surveyed employers in Jordan and 8% in Palestine indicating that they did not know if their companies would see an increase in revenue in the coming years, it appears that there remains a fair amount of uncertainty regarding the economic recovery and the ability of companies to bounce back.

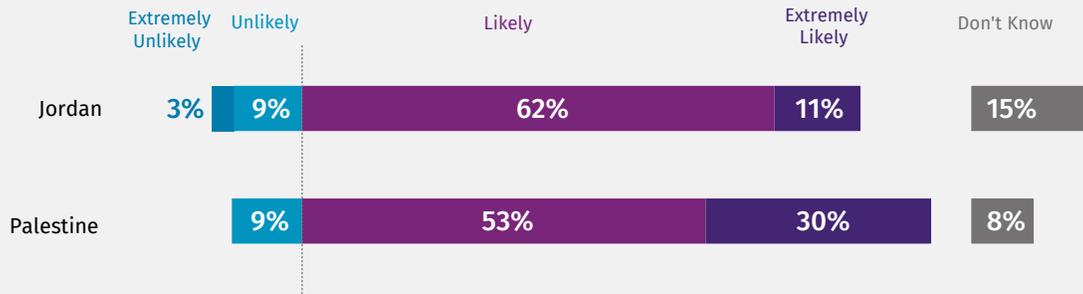


Figure 4: Following the start of the pandemic, companies in Jordan and Palestine were most affected by reduced demand for their products and services as well as temporary shutdowns



Source: Employer Survey. N=222 (Jordan: 124; Palestine: 98). Respondents were prompted to select all options that applied to them.

Figure 5: Surveyed employers in Jordan and Palestine were highly likely to believe that their companies would see an increase in revenue over the next two years



Source: Employer Survey. N=222 (Jordan: 124; Palestine: 98).



Government Support Received

Surveyed employers in Jordan were significantly more likely than those in Palestine to have received government support during the pandemic. This is not surprising given the varying approaches to the pandemic response that the GoJ and the PA were able to pursue given their differing levels of access to financial resources. However, it is notable that 40% of employers in Jordan indicated that they had not received any government support.

Given the varying government interventions, employers in Jordan were more likely than those in Palestine to have received financial support from the government in the form of tax exemptions, subsidies to support employee trainings and salaries, and loans to offset losses. Employers in Jordan were also significantly more likely to have received government approval to decrease costs by reducing employee salaries and company social security payments on behalf of employees (Figure 6). Measures pertaining to social security payments were not relevant for employers in Palestine, as there is not an active social security institution in Palestine.⁹³

In Palestine, government provision of subsidized COVID-19 tests for the workplace was the most common form of government assistance, with 10% of employers receiving this support. Other forms of government support were not widespread in Palestine.

Effects of COVID-19 on Staffing

The employer survey captured information relating to changes in firm sizes brought on by COVID-19. It is important to note that the timing of the survey a year and a half into the pandemic means that the findings pertain only to firms that survived multiple rounds of COVID-19 lockdowns and restrictions in Jordan and Palestine. However,

the responses of this group are most relevant to understanding the potential for job growth in the coming years, which is why they formed the main focus of the study.

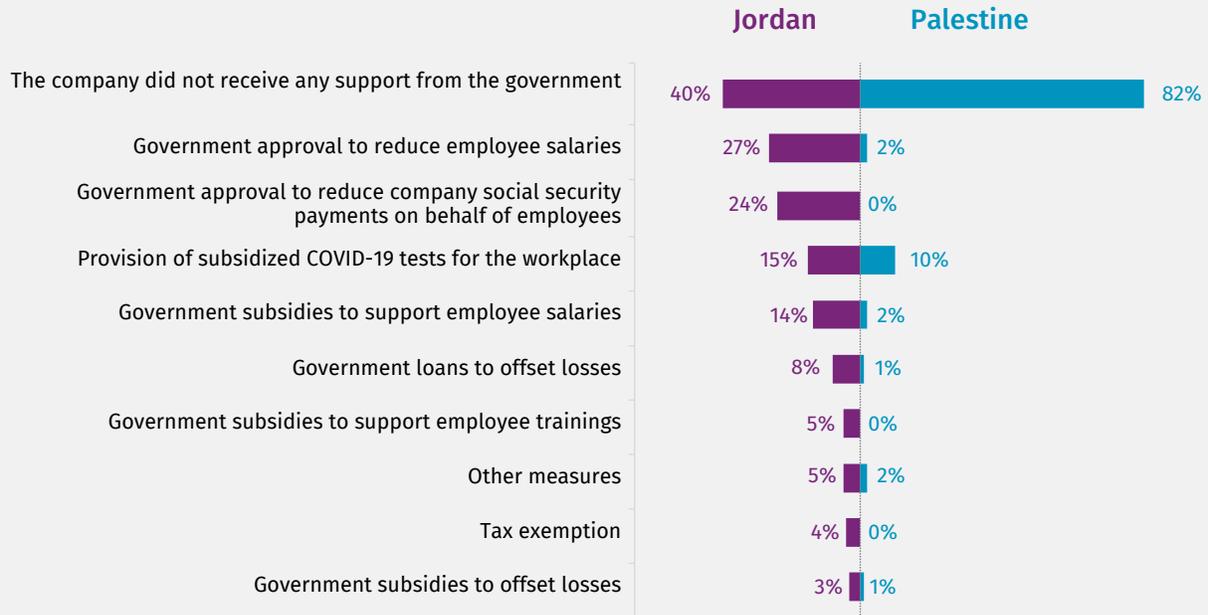
Employers were asked to indicate how many employees worked at their company at the time of the survey and prior to the COVID-19 crisis, selecting from numerical ranges. Responses were then grouped into standard categories that included microenterprises (fewer than 10 employees), small enterprises (between 10-49 employees), medium-sized enterprises (between 50-249 employees) and large enterprises (250 employees or more). The groupings were determined using Organisation for Economic Co-Operation and Development (OECD) criteria for business size classifications.⁹⁴ Ranges were offered to respondents in lieu of requesting specific numbers of employees, as it was assumed that not all respondents would have access to precise staffing information given that not all of them worked in human resources or executive leadership. This use of ranges does limit the sensitivity of the analysis, however.

In both Jordan and Palestine, the majority of firms surveyed remained of a similar size prior to the pandemic compared to a year and a half into it, including 79% of surveyed firms in Jordan and 80% of surveyed firms in Palestine. A small share of firms grew to the extent that they moved into a new size classification, including 6% of surveyed firms in Jordan and 4% of surveyed firms in Palestine. However, 13% of firms in Jordan downsized, as did 12% of firms in Palestine (Figure 7).

Among surveyed firms that downsized in Jordan, approximately a third were in the restaurant/catering/food distribution industry and approximately a fifth were in the tourism and hospitality sector. Firms that increased in size were in a variety of sectors including health care, manufacturing, education/academia, and others.



Figure 6: Employers in Jordan were significantly more likely than those in Palestine to have received government support during the pandemic



Source: Employer Survey. N=222 (Jordan: 124; Palestine: 98).

Figure 7: Most surveyed firms in Jordan and Palestine remained of a similar size during the first year and a half of the pandemic, but 13% of firms in Jordan and 12% of firms in Palestine downsized

Jordan		Business Size a Year and a Half into the Pandemic			
		Micro	Small	Medium	Large
Business Size Pre-COVID	Micro	22%	3%		
	Small	7%	26%	2%	
	Medium		2%	18%	1%
	Large			4%	13%

Palestine		Business Size a Year and a Half into the Pandemic			
		Micro	Small	Medium	Large
Business Size Pre-COVID	Micro	37%	2%		
	Small	10%	21%	2%	
	Medium		2%	8%	
	Large				14%

- Firm increased in size compared to pre-pandemic
- Firm maintained the same size compared to pre-pandemic
- Firm decreased in size compared to pre-pandemic

Source: Employer Survey. N=222 (Jordan: 124; Palestine: 98). Additionally, 2% of surveyed employers in Jordan and 3% in Palestine indicated that they did not know the number of employees that the company had on staff currently or prior to the COVID-19 crisis. The percentages in the tables have been rounded to the nearest whole number in order to facilitate presentation.



Half of surveyed employers in Jordan and Palestine expect to hire additional employees over the next two years, and one-third expect to maintain their current staff size

Among surveyed firms that downsized in Palestine, nearly half were in the advertising/marketing/PR field and a quarter were in ICT. These industries were also represented among firms that increased in size, however, as were the education/academia, banking/finance, and logistics sectors. The participation of firms from a wide range of sectors in the survey and the resulting small sample size from each limits the extent to which sector trends can be drawn from the data.

Staffing Expectations

Half of surveyed employers in Jordan and Palestine indicated that they expect to hire additional employees over the next two years, and one-third expect to maintain their current staff size. Only 6% of surveyed employers in Jordan and 10% in Palestine anticipated that they would reduce their current workforce over the coming two years.

Just as some employers felt that they have a lack of visibility into future revenues, 14% of surveyed Jordanian employers and 9% of those in Palestine indicated that they were unsure of their company staffing expectations (Figure 8).

Among respondents in Jordan who indicated that they expect their companies to increase in staff

size, 38% thought that their companies would hire between one and five new employees. Smaller shares indicated that they would hire between 6-10, 11-15, and 16-20 new employees. In addition, 14% indicated that they would hire 30 or more new employees.

In Palestine, more than half of employers who indicated that they expect their companies to increase in staff size thought that they would hire between one and five new employees (Figure 9).

As such, although a similar share of surveyed companies in Jordan and Palestine are planning to hire in the coming two years, surveyed Jordanian companies are more likely to hire a larger number of staff. This is likely because the Jordan sample included a greater proportion of larger companies than the Palestine sample, as the analysis revealed that larger firms were more likely to be planning to hire greater numbers of staff.

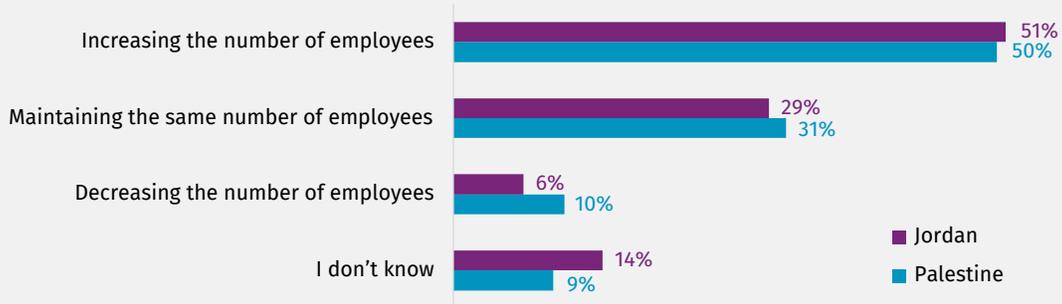
In both Jordan and Palestine, the number of employers who indicated that they planned to reduce their staff size was small, constituting only eight in Jordan and seven in Palestine. The small size of this subgroup limits the potential to draw conclusions from it that are generalizable. Among these particular employers, the majority planned to lay off fewer than 20 staff.

Impacts of COVID-19 on Work Modalities

One of the defining features of work culture during the pandemic has been the transition to telework at an unprecedented scale and pace. Organizations and workers in Jordan and Palestine participated in this trend. One subject matter expert consulted for this report noted that in the case of Palestine, this transition represented a significant shift in the typical way of doing business, as local work culture prior to COVID-19 had empha-

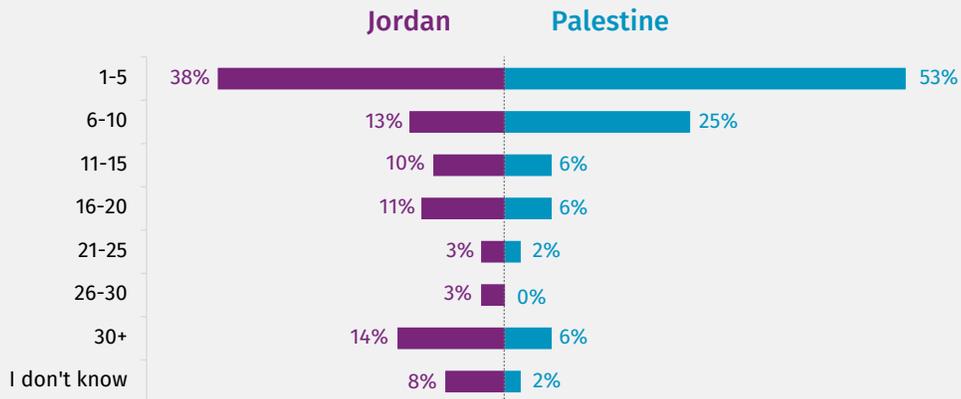


Figure 8: Half of surveyed employers in Jordan and Palestine expect that their companies will grow their workforce over the next two years



Source: Employer Survey. N=222 (Jordan: 124; Palestine: 98).

Figure 9: Among surveyed companies that expect to increase staff size, those in Jordan are more likely than those in Palestine to hire a larger number of staff



Source: Employer Survey. N=112 (Jordan: 63; Palestine: 49). Surveyed companies in Jordan were larger on average, which is likely the reason why they will be hiring greater numbers of staff.



sized the importance of on-site work following standard business hours. Another noted that in their opinion, this trend was not likely to continue given the emphasis of private sector employers on having employees physically report to work.

While this transition allowed many in Jordan and Palestine to continue working during lockdown periods, the benefits of telework were not equally distributed among all workers. Subject matter experts and key stakeholders noted that many workers were unable to telework due to the nature of their employment, which meant that they faced the most significant economic impacts from the lockdowns. Given that only an estimated 29% of jobs in Jordan and 23% in Palestine are amenable to telework,⁹⁵ a large share of the labor force in Jordan and Palestine likely faced challenges in accessing employment during lockdown periods.

Provision of Teleworking Options

The results of the employer and youth surveys support the finding that access to teleworking opportunities a year and a half into the pandemic was varied. In Jordan, 41% of employers surveyed reported that at least some of their staff were teleworking or had a flexible teleworking arrangement at the time of the survey, as did 61% of employers surveyed in Palestine. Within Palestine, employer respondents in Gaza were nearly twice as likely as those in the West Bank to indicate that at least some of the company's staff were teleworking as a result of COVID-19 (Figure 10).

The observed differences in provision of teleworking options between surveyed employers in Jordan and Palestine may be partially a result of differences in the sector distributions of the samples from each location. Restaurants/catering/food delivery, tourism/hospitality, and retail – all sectors that have a low level of teleworkability – made up a combined 34% of the sample in Jordan,

whereas they made up only a combined 3% of the sample for Palestine. Consultancy, banking/finance, and advertising/marketing/PR, which have a relatively high level of teleworkability, made up a combined 35% of the Palestine sample compared to just 7% of the Jordan sample.

The difference in distributions between the West Bank and Gaza are not as likely to be related to differences in sectors of operation. The sectors for which there were statistically significant differences in the sample between the two locations were banking/finance and advertising/marketing/PR, both of which are highly teleworkable. These sectors represented a combined 24% of the West Bank sample compared to 34% of the Gaza sample. However, despite this relatively small difference, companies in Gaza were nearly twice as likely as those in the West Bank to indicate that teleworking opportunities were being offered as a result of COVID-19.

This difference may be due to the fact that COVID-19 had the most significant impact in Gaza at a later point than the West Bank. This delayed impact could be leading more companies in Gaza to offer teleworking later into the pandemic compared to those in the West Bank. The after effects of the May 2021 hostilities may have also contributed to this higher rate of teleworking offerings.

Although anecdotal due to the relatively small number of surveyed employers within each sector, surveyed employers in Jordan operating in manufacturing, restaurants/catering/food delivery, retail, and tourism/hospitality tended to indicate that they were not offering teleworking options to their employees. For the majority of position types in these sectors, in-person work is required (e.g., assembly line workers, restaurant servers). This limits the ability of employees to complete their jobs remotely.



Within the sample, Jordanian firms operating in the education/academia and ICT sectors were the most likely to offer teleworking options for staff. The shift to online learning meant that many teachers worked from home following the start of the pandemic, and the nature of ICT employment makes it possible to complete tasks without reporting to an office. In Palestine, surveyed firms operating in ICT and advertising/marketing/PR were the most likely to offer teleworking options. However, as mentioned above, these observations are anecdotal given the relatively small number of surveyed employers within each sector.

Youth Access to Teleworking Options

The youth survey conducted under this study also addressed the topic of telework. Among youth who maintained the same job during the first year and a half of the pandemic, 29% in Jordan and

63% in Palestine were permitted to telework. An additional 35% of youth in Jordan and 22% in Palestine indicated that teleworking was not feasible for their position, and the remaining 36% in Jordan and 15% in Palestine indicated that they were not permitted to telework (Figure 11).

Youth who had maintained the same job throughout the pandemic were selected to provide input regarding telework, as it was expected that youth who were new to their jobs may be less likely to have access to teleworking, making their responses less informative regarding the behavior of their employers. The relatively small size of this cohort in Jordan (28 youth), does create limitations for the analysis, however.

The differences in youth access to teleworking opportunities were not necessarily related to sector of employment or occupation, as there were no

Figure 10: Employer provision of teleworking opportunities as a result of COVID-19 was varied among surveyed firms in Jordan and Palestine a year and a half into the pandemic



Source: Employer Survey. N=222 (Jordan: 124; Palestine: 98 – West Bank: 51; Gaza: 47). The differences in Jordan and Palestine may be driven by variation in sector representation among surveyed firms in each sample. The differences between Gaza and the West Bank may be due to the fact that the pandemic had the most significant effects in Gaza later on than the West Bank, in addition to the May 2021 hostilities.



significant differences in these factors within this subset of youth in the Jordan and Palestine samples. The differences observed also do not appear to be related to varying rates of virtual freelancing among youth in Jordan and Palestine, as none of the employed youth surveyed indicated that they were working under freelancing contracts.

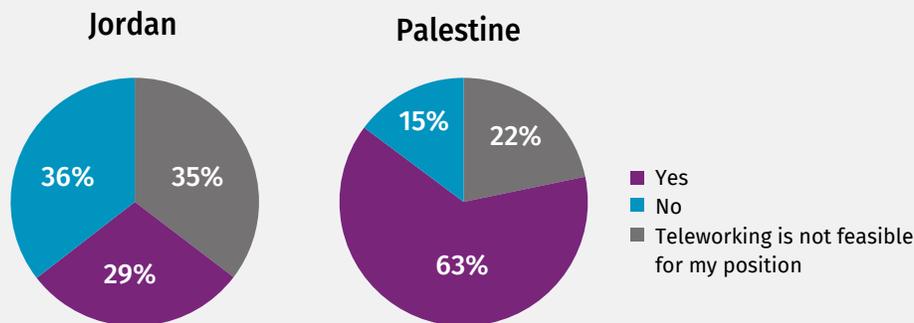
Given this lack of variation and limitations due to sample size, the analysis did not produce conclusive evidence regarding the potential determinants of youth access to teleworking opportunities. In addition, the differences in sector distributions between the employer samples from Jordan and Palestine limit the potential to conclude whether the provision of teleworking options is more or less prevalent in either location. Further research is needed to draw more definitive conclusions.

Changes in Teleworking Provision due to COVID-19

Study results indicate that although telework options were offered by some companies prior to the pandemic, many companies in Jordan and Palestine moved to expand this option or offer it for the first time as a result of COVID-19.

Among surveyed employers in Jordan who indicated that some staff at their companies were teleworking as a result of COVID-19, 61% of them did not have any staff teleworking prior to the pandemic. Furthermore, 78% of companies that had at least some employees teleworking at the point of survey administration indicated that the current share of teleworking employees was greater than that of the pre-pandemic period. Fourteen percent of employers maintained the

Figure 11: Among youth who maintained the same employment during the first year and a half of the pandemic, those in Palestine were more than twice as likely as those in Jordan to have access to teleworking options



Source: Youth Survey. N=71 (Jordan: 28; Palestine: 43). Results for Palestine were not disaggregated by West Bank/Gaza due to sample size limitations.



same share of teleworking staff compared to the pre-pandemic period, while only 4% decreased their share. All companies that decreased the proportion of staff who were teleworking had a large share who were already teleworking prior to the pandemic, reaching 60% or greater.

Among surveyed employers in Palestine who indicated that some staff were teleworking as a result of COVID-19, 38% of them did not have any staff who had been teleworking prior to the pandemic. Furthermore, 78% of employers indicated that the overall share of their staff who were teleworking a year and a half into the pandemic was greater than the share who were teleworking prior to COVID-19. A total of 17% maintained the same share of teleworking employees, and only 2% of employers decreased their share (Figure 12).

As such, surveyed employers in Palestine were more likely than those in Jordan to offer teleworking arrangements for their employees a year and a half into the pandemic and to have already been offering teleworking arrangements prior to the outbreak of COVID-19.

There was notable variation in the share of employees to whom surveyed companies in Jordan and Palestine offered teleworking opportunities a year and a half into the pandemic. Among employers in Jordan who offered teleworking options at that point, nearly half (47%) offered it to fewer than 10% of their staff, compared to 27% of employers in Palestine who offered it to the same share of staff.

As mentioned above, the observed difference in whether or not teleworking options are made available may be due to variation in the sectors of operation of surveyed employers in the two samples. However, this variation in sectors may also have affected the share of employees to whom surveyed companies could feasibly extend tele-

Although telework options were offered by some companies prior to the pandemic, many companies in Jordan and Palestine moved to expand this option or offer it for the first time as a result of COVID-19

working options. Companies operating in the ICT field, for example, could feasibly have all of their staff engaged in telework, whereas those operating in sectors such as retail or hospitality could likely only extend this option to administrative and managerial staff.

Likelihood of Continued Provision of Teleworking Options

The study aimed to understand the likelihood that the teleworking trend will continue in Jordan and Palestine. Employer respondents who indicated that some staff were teleworking at the time of the survey were asked if they would continue to telework after the COVID-19 crisis. A significant share of employers stated that all of their employees would return to their normal worksite after the pandemic, totaling 45% of employers in Jordan and 55% in Palestine. However, 21% of these employers in Palestine also stated that some or all of their employees would maintain a flexible teleworking arrangement, indicating a degree of flexibility even for those who return to their usual worksites.



Figure 12: Among surveyed employers in Jordan and Palestine who had at least some staff teleworking as a result of COVID-19, the majority had increased the overall share of staff who were teleworking compared to the pre-pandemic period

Jordan		% Staff Teleworking a Year and a Half into the Pandemic											
		0%	1-9%	10-19%	20-29%	30-39%	40-49%	50-59%	60-69%	70-79%	80-89%	90-99%	100%
% Staff Teleworking Pre-COVID	0%		39%	4%	2%			4%	4%	2%	4%	2%	
	1-9%		8%		4%	2%				2%		2%	
	10-19%			2%		2%	2%						
	20-29%				2%								2%
	30-39%												
	40-49%												
	50-59%												
	60-69%			2%									2%
	70-79%												
	80-89%												
	90-99%							2%					
	100%												2%

Palestine		% Staff Teleworking a Year and a Half into the Pandemic											
		0%	1-9%	10-19%	20-29%	30-39%	40-49%	50-59%	60-69%	70-79%	80-89%	90-99%	100%
% Staff Teleworking Pre-COVID	0%		15%	5%	12%			5%			2%		
	1-9%		10%	3%	2%	3%	2%	2%		2%	2%	2%	
	10-19%			3%	2%		2%				2%	2%	
	20-29%								2%	2%			
	30-39%		2%										
	40-49%						2%			3%			
	50-59%								2%				5%
	60-69%											2%	
	70-79%												
	80-89%												2%
	90-99%												
	100%												2%

- Firm increased the share of staff who were teleworking
- Firm maintained the same share of staff who were teleworking
- Firm decreased the share of staff who were teleworking

Source: Employer Survey. N=111 (Jordan: 51; Palestine: 60). An additional 4% of the employers in Jordan who were offering teleworking options a year and a half into the pandemic and 3% of those in Palestine indicated that they did not know the percentage of company staff who were teleworking prior to the pandemic. The percentages in the tables have been rounded to the nearest whole number in order to facilitate presentation. In both Jordan and Palestine, 78% of firms had a larger share of staff who were teleworking a year and a half into the pandemic compared to the pre-pandemic period.



Overall, 20% of employers in Jordan indicated that they would continue offering flexible telework for some employees, 14% would offer flexible telework for all employees, and 10% would require some employees to telework.

In Palestine, 32% of employers indicated that they would continue to offer flexible teleworking arrangements for some employees. An additional 13% indicated that they would maintain flexible teleworking for all employees, and 8% would require telework for some employees.

Some employers in Jordan and Palestine stated that they did not know what the future telework arrangements at their companies would be, totaling 12% of employers in Jordan and 6% of employers in Palestine (Figure 13).

Given the large share of employers who indicated that all employees who are currently teleworking would eventually return to their normal worksite, it appears that the transition to telework may re-

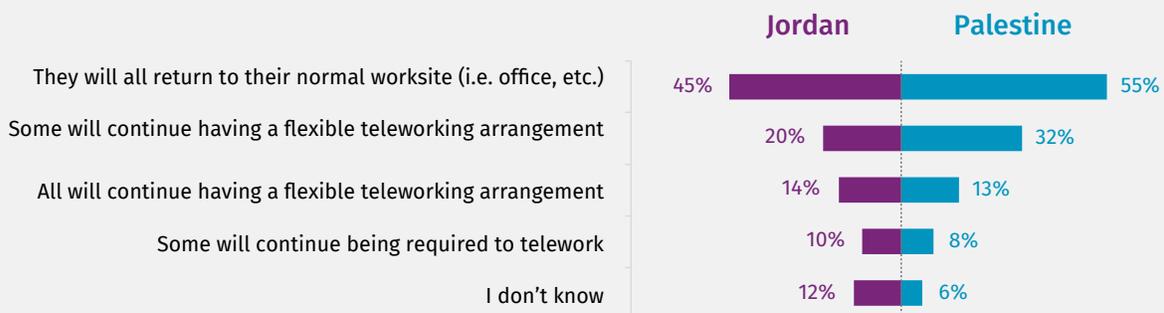
main a temporary experiment for some employers. However, for others, it appears that their employees may continue to benefit from increased flexibility.

Impacts of COVID-19 on Youth Opportunities

Youth were among the most affected by the COVID-19 pandemic given their already low rates of labor force integration in the form of high unemployment rates and limited work experience. Intersecting vulnerabilities of gender, refugee status, disability, and residence in under-resourced locations further compounded the negative impacts of the pandemic on youth.

Given the role of intersecting vulnerabilities in affecting youth labor market outcomes, this section begins by exploring the general impacts that the pandemic had on women, refugees, and persons with disabilities, and then moves on to a discussion of the results of the youth survey conducted

Figure 13: A large share of employers in Jordan and Palestine indicated that all of the employees at their company who are currently teleworking will return to their normal worksite after the COVID-19 crisis. However, many will continue to offer teleworking arrangements to their staff.



Source: Employer Survey. N=102 (Jordan: 49; Palestine: 53). One observation from Jordan and two from Palestine were excluded from the analysis because respondents provided conflicting responses. Twenty-one percent of the Palestinian employers who stated that their employees will return to their normal worksite also stated that some or all of them will maintain a flexible teleworking arrangement, indicating some level of flexibility even for those who will return to their usual worksites.



under this study. In order to gather learnings relating to these intersecting vulnerabilities, the analysis of the youth survey includes discussions of where youth labor market outcomes or youth perspectives differed according to gender, refugee status in the case of Jordan, and residence in the West Bank and Gaza in the case of Palestine.

As noted in the Methodology section, residence in Gaza was correlated with having refugee status.ⁱ This correlation, coupled with the significantly higher proportion of the population in Gaza who are refugees compared to the West Bank – 64% compared to 26%, respectively⁹⁶ – means that the results recorded for Gaza may also be suggestive of the experience of some Palestinian refugees residing in Palestine during the crisis. However, there is significant potential for additional studies to be conducted to explore the unique workforce development needs of Palestinian refugee populations, both within Palestine as well as in neighboring countries.

Due to sample size limitations of the youth survey, results for persons with disabilities have only been disaggregated for the employment rate measure. There is significant potential for future studies to further explore the labor market outcomes of persons with disabilities in Jordan and Palestine, and to propose evidence-based programming approaches to support their engagement in the labor market.

Women

The pandemic has had acute and disproportionate impacts on women's employment and psychosocial health across the world, including in Jordan and Palestine. With protracted school and daycare closures following the start of the pandemic, women disproportionately shouldered the

added responsibility of childcare, in addition to caring for older family members.⁹⁷ Furthermore, in Jordan, women's employment is highly concentrated in the education and health sectors,⁹⁸ which meant that they were significantly affected by both the health crisis and the transition of education online.

According to a study by UN Women early in the pandemic, 68% of women in Palestine reported an increase in unpaid care work, compared to just 44% of men.⁹⁹ In another study by UN Women pertaining to Jordan, it was estimated that unpaid work for married women with school-aged children could reach between 18-24 hours per week as a result of the pandemic.¹⁰⁰ This phenomenon was mirrored across the MENA region. The 2020 Asda'a BCW Arab Youth Survey found that 67% of youth felt that women were more likely to have family responsibilities since the pandemic began.¹⁰¹ In addition to these significant challenges, women in Jordan and Palestine also faced increased rates of domestic violence and reduced access to reproductive health services during this period.¹⁰²

Women's labor force participation prior to the pandemic was low in both Jordan and Palestine, reaching just 15.6% and 19.1% in 2019, respectively.¹⁰³ Low participation rates were due to several cultural and structural factors, including views about women's role in society, labor laws, and barriers related to transportation and childcare.¹⁰⁴

The trend of low labor force participation rates among women worsened as a result of the pandemic. In Palestine, the labor force participation rate declined nearly twice as much for women as it did for men in 2020, dropping by 8.1%.¹⁰⁵ Subject matter experts and key stakeholders consulted for this report stated that some businesses in

i UNRWA considers Palestinian refugees to be Palestinians who lost access to their livelihoods and homes during the 1948 conflict.



The pandemic has had acute and disproportionate impacts on women's employment and psychosocial health across the world, including in Jordan and Palestine

Palestine that had to lay off workers generally retained male workers over females. They explained that this was both because of cultural norms that prioritize employment for men over women during times of job scarcity and due to the increased domestic responsibilities that fell to women following the start of the pandemic.

The impact of COVID-19 on women in Palestine was most significant in Gaza, where limited mobility and resource insecurity already affected their economic opportunities prior to the pandemic. Women in Gaza saw their average weekly working hours decrease by 34.9%, while their peers in the West Bank saw a smaller, though significant, decrease of 17.5%. Women in both locations experienced reductions in hours that were greater than those experienced by men, however. Men in Gaza saw a drop in working hours averaging 21.5% and men in the West Bank experienced an average drop of 13.5%.¹⁰⁶

In Jordan, the female labor force participation rate decreased to 14.1% in 2020, placing the country 145th out of 153 countries on the Global Gender Index's Economic Participation and Opportunity subindex.¹⁰⁷ In contrast to the situation in Palestine, however, a 2020 UN Women report found that the paid weekly working hours for many em-

ployed women in Jordan actually increased as a result of the pandemic. Nearly half of working Jordanian women are employed in the health-care and education sectors. These sectors were deemed critical by the GoJ and experienced an increase in demand and intensity of work following the start of the pandemic. However, since many of the women working in these sectors were salaried, an increase in working hours did not necessarily entail an increase in wages earned during this time.¹⁰⁸

As such, following the start of the pandemic, women in Jordan and Palestine saw their limited gains in the labor market shrink as they struggled to adapt to an expansion of their already significant care and domestic work. Given these increased challenges facing women, workforce development implementers should focus particular effort on integrating women into programming during the COVID-19 recovery in order to support them in expanding their role within the labor market following the setback of the pandemic.

Refugee Populations in Jordan

Since 2016, the GoJ has implemented policies to work toward improving living conditions for Syrian refugees through the Jordan Compact. Through this compact, the GoJ committed to allowing employment for 200,000 Syrians through the provision of work permits.¹⁰⁹ Over the first year of the work permit program, the GoJ removed some of the restrictions it had initially applied, allowing Syrians to request permits without a fee, and removing requirements for enrollment in social security programs and completion of medical examinations.

Under the program, Syrian refugees are restricted in the sectors in which they are permitted to work. Until 2020, this list included agriculture, construction, food and beverage services, manufacturing,



and wholesale and retail trade. In July 2020, this list was expanded to include food, handicrafts, and tailoring in an effort to increase female inclusion in the labor market through both wage employment and entrepreneurship.¹¹⁰

Despite the work permit program, an estimated two-thirds of the 1.3 million Syrian refugees living in Jordan work informally.¹¹¹ This high prevalence of informal work among Syrian refugees puts them at increased risk of job insecurity. Informal sector employees were not protected under GoJ Defense Order No. 6, which prohibited employers from terminating employees following the start of the pandemic, and they were eligible for only limited benefits under subsequent government programs aimed at supporting workers impacted by COVID-19.

In April 2020, the ILO and Fafo surveyed 1,580 Syrians and Jordanians about the impact of COVID-19 on their employment and livelihoods. According to the study, Jordanian nationals and refugees experienced widespread layoffs, both permanent and temporary, following the first lockdown in Jordan in March 2020. However, permanent dismissals were more common for Syrians, with 38% of Syrian men and 28% of Syrian women losing their jobs compared to 19% of Jordanian men and 15% of Jordanian women. Furthermore, among Syrian respondents who lost jobs, 34% of them did not have written contracts.¹¹²

Extensive layoffs in the informal sector also had a severe impact on refugees who are not Syrian, many of whom rely on informal employment for their livelihoods.¹¹³ Individuals from countries other than Syria are not permitted to maintain registration as refugees with UNHCR and also secure work permits, as they are not included in the Jordan Compact.¹¹⁴

In addition to these impacts on the employment of refugees in Jordan, the pandemic also threat-

ened their food security. According to the World Food Programme (WFP), by the third quarter of 2020, only 12% of refugee households were food secure, 21% were food insecure, and the remaining share were vulnerable to food insecurity. Food assistance has provided necessary support to refugees during the pandemic. However, significant gaps created by the loss of income from labor and the suspension of school feeding programs still remain. Small and female-headed households have been particularly affected.¹¹⁵

Refugee Employment

The employer survey conducted under this study explored the topic of employment opportunities for refugees in Jordan in light of the pandemic. Respondents were asked to indicate the share of company employees who were refugees prior to the pandemic and a year and a half into it, using ranges. Ranges were offered to respondents in lieu of requesting specific numbers of employees who are refugees, as it was assumed that not all respondents would have access to precise staffing information given that not all of them worked in human resources or executive leadership. This use of ranges does limit the sensitivity of the analysis, however.

A year and a half into the pandemic, 60% of surveyed employers reported that none of their staff members were refugees and just over a quarter of companies reported that between 1-9% of employees were refugees. Companies employing a greater share of refugees were the minority. Firms that had staff comprised of 30% refugees or more were in the construction, manufacturing, and restaurants, catering, and food distribution sectors. These sectors are among those in which the GoJ currently permits Syrian refugees to work (Figure 14).

Although there was no statically significant change in the proportion of staff at surveyed



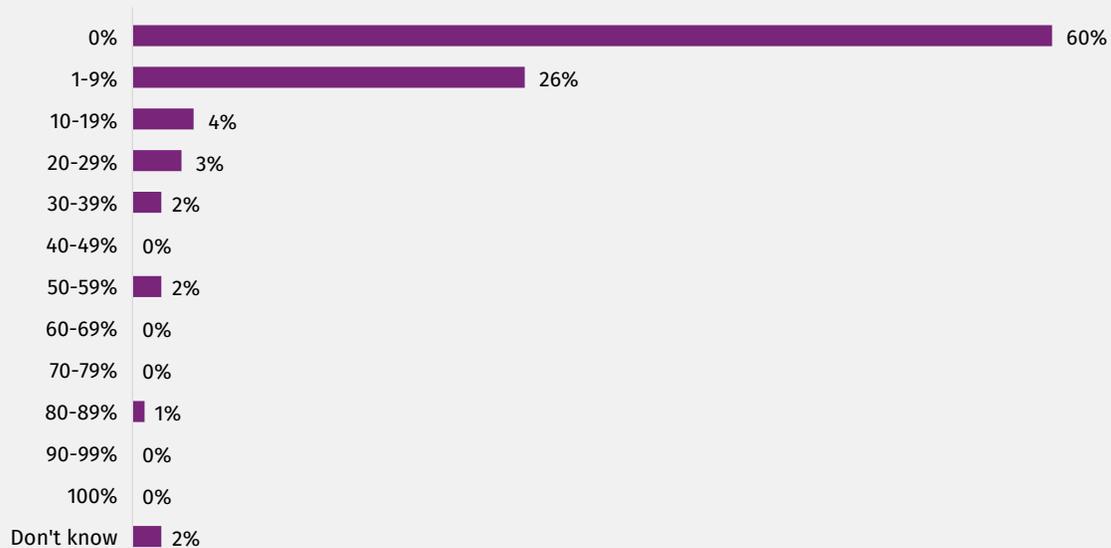
companies who were refugees prior to the pandemic compared to a year and a half into it, 12 of the 124 firms surveyed indicated that they had reduced the share of their staff who were refugees between the two measurement points.

In addition, among the 16 companies in the sample that reduced their overall staff size during the first year and a half of the pandemic, there was a notable drop in the share of employees who were refugees. Among these companies, 12.5% indicated that between 1-9% of their employees were refugees prior to the pandemic, and 44% indicated that 10% or more of their employees were refugees. A year and a half into the pandemic, 37.5% of them indicated that just 1-9% of their employees were refugees, and only 18.5% indi-

cated that 10% or more of their employees were refugees. As such, it appears that there may have been a tendency among some companies to reduce the share of refugees on staff during periods of staff downsizing. Due to the small sample size of this group, these results should be interpreted cautiously. However, they are in line with the findings of the abovementioned ILO and Fafo study that documented a higher rate of permanent job losses among Syrian refugees in Jordan following the start of the COVID-19 crisis.¹⁶

Additional detailed discussion on labor market outcomes of refugees in Jordan as well as the impact of the pandemic on the communities of refugee youth is included in the sections below that outline the results of the youth survey.

Figure 14: A year and a half into the pandemic, 60% of surveyed firms in Jordan had no employees who were refugees



Source: Employer Survey. N=124. There was no statistically significant change in the distribution of refugee representation among surveyed companies prior to the pandemic compared to a year and a half into it.



Persons with Disabilities

With the outbreak of COVID-19, persons with disabilities faced higher risks of negative health and economic outcomes compared to others. These increased risks were due, in part, to discrimination and barriers in accessing adequate health-care, livelihood support, and other critical services. Globally, persons with disabilities tend to have lower than average rates of employment and a higher likelihood of working informally. These factors put them at increased economic risk during crises, such as the pandemic, given that informal workers often do not have access to social insurance.¹¹⁷

Persons with disabilities may also be unable to work from home if critical support or equipment are only available in their workplaces. Furthermore, economic shocks can have a more significant impact on individuals with disabilities given the greater costs that they may face relating to assistive devices, accessible housing, and related considerations.¹¹⁸

In both Jordan and Palestine, persons with disabilities faced challenges to accessing employment opportunities prior to and following the start of the pandemic. In Jordan, persons with disabilities constitute an estimated 11.1% of the population. However, with only 28% of persons with disabilities being employed,¹¹⁹ they made up less than 0.5% of workers in the private sector and less than 1% of workers in the public sector as of 2017. In addition, the employment rate for men with disabilities the same year was just over half that of men without disabilities (33% compared to 61%), and for women with disabilities, the rate was a mere 5%, less than half the rate for women without disabilities (13%).¹²⁰

Since 1993, the Jordanian government has imposed quotas to encourage full participation in

the workforce for those with disabilities. However, the success of these laws has been limited by poor accessibility of workplaces and transportation systems, minimal fines for violators, legal loopholes, conflicting laws, and social stigma.¹²¹

Humanity & Inclusion (HI) has found that Jordanian families that have members with disabilities have struggled during the pandemic. In a needs assessment surveying 942 households currently benefitting from HI programming, including 418 which had children with disabilities and 524 which had adults with disabilities, HI found that only 67% of surveyed households had at least one member who was employed prior to the pandemic. Out of these, 78% had family members who lost jobs due to movement restrictions designed to curb the spread of COVID-19. Within this context, 79% of respondent households indicated that they were facing food insecurity and 59% indicated that they lacked sufficient financial resources.¹²²

In Palestine, labor force participation and employment rates are very low for persons with disabilities. Even prior to the pandemic, persons with disabilities faced barriers to participating in the workforce, including a lack of legal requirements for employers to provide necessary workplace adaptations.¹²³ Prior to the pandemic, 2.1% of the Palestinian population were persons with disabilities, 51% of whom had a disability related to mobility.¹²⁴ In 2017, among persons with disabilities who were of working age (15-59 years old), only a third of them were economically active. Among those who were active, the unemployment rate reached 38.3%.¹²⁵

Furthermore, significant gaps in labor force participation and employment rates existed between the West Bank and Gaza as well as between men and women. Employment rates of persons with disabilities were nearly twice as high in the West



Bank compared to Gaza. Among women with disabilities, 9% participated in the labor force, with the unemployment rate for this group reaching 45.4%, whereas among men with disabilities, 47% participated in the labor force, with the unemployment rate for this group reaching 37.5%.¹²⁶

Among persons with disabilities in Palestine who were employed prior to the pandemic, 63.1% were working for Palestinian private businesses.¹²⁷ Given the layoffs that occurred in the private sector following the start of the pandemic, it is likely that at least some persons with disabilities experienced job losses or reductions in hours as a result of COVID-19.

In addition to these likely impacts to employment, persons with disabilities experienced barriers to accessing assistive devices due to border closures that blocked imports. They also faced barriers in accessing rehabilitation services and psychosocial support.¹²⁸

The Palestinian development planning framework includes a focus on supporting persons with disabilities through services to help them access employment as well as improved awareness of their right to do so. The framework also aims to expand their access to Technical and Vocational Education and Training (TVET),¹²⁹ but much work remains to fully integrate persons with disabilities into the Palestinian workforce.

Approximately one in four surveyed companies in Jordan and Palestine employed persons with disabilities

Employment of Persons with Disabilities at Surveyed Employers

In order to gather insights on the impacts of the pandemic on employment opportunities for persons with disabilities, the employer survey asked respondents to indicate the percentage of their staff who were persons with disabilities prior to COVID-19 and at the time of survey administration, using ranges. Ranges were offered to respondents in lieu of requesting specific numbers of employees who are persons with disabilities, as it was assumed that not all respondents would have access to precise staffing information given that not all of them worked in human resources or executive leadership. The use of ranges does limit the sensitivity of the analysis, however.

In Jordan, 73% of employers surveyed indicated that their companies did not employ any persons with disabilities at the time of the survey, whereas 25% indicated that 1-9% of their staff was made up of persons with disabilities. An additional 2% indicated that they did not know.

Firms in Jordan that had persons with disabilities among their employees operated in a wide variety of sectors including advertising/marketing/PR, manufacturing, and restaurants, catering, and food distribution, as well as others.

In Palestine, approximately a quarter of surveyed employers indicated that they had employees on staff who were persons with disabilities, whereas three-fourths indicated that they did not have any persons with disabilities on staff. Most companies that had persons with disabilities on staff indicated that they made up 1-9% of staff (Figure 15). There were no statistically significant differences between the West Bank and Gaza.

There were no statistically significant differences in the hiring patterns of persons with disabilities



among surveyed firms in Jordan prior to the pandemic compared to a year and a half into it, but there were some differences detected among employers in Palestine. Although 95% of Palestinian employers surveyed maintained the same percentage of persons with disabilities among their staff during the first year and a half of the pandemic, 4% decreased the share of their employees who were persons with disabilities, and no employers increased their share (Figure 16).

Among surveyed companies, those that had the highest proportions of employees with disabilities were operating in the banking/finance, education/academia, and ICT sectors.

It is a positive sign that a quarter of surveyed firms employed individuals with disabilities, and that most companies that were employing them prior to the pandemic do not appear to have let them go in large numbers. However, the results of the youth survey indicate that employment outcomes for surveyed youth with disabilities during the pandemic were mixed.

Of the individuals who participated in the youth survey, 14 in Jordan and six in Palestine indicated

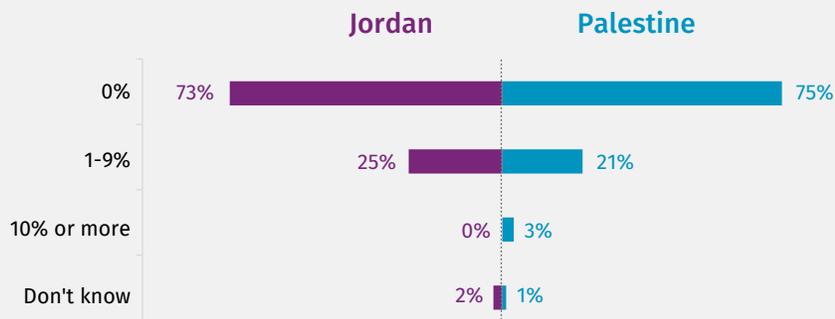
that they have a disability. Among them, 29% in Jordan and 67% in Palestine were employed a year and a half into the pandemic, compared to 14% in Jordan and 17% in Palestine who were employed at the beginning of the pandemic. Although the small sample size limits the generalizability of these findings, the employment figures suggest that labor market outcomes for these particular youth were varied.

There is significant potential for further studies to explore the education to work transition for youth with disabilities and to outline best practices for implementers working to support these youth.

Youth Employment Outcomes

The youth survey aimed to understand the employment outcomes and economic wellbeing of youth over the course of the pandemic by inquiring about their employment activities, hours worked, sufficiency of income, government support received, and contributions made to their households. The study also examined whether there were any changes in the nature of the employment that youth secured before and after the start of the pandemic.

Figure 15: A year and a half into the pandemic, approximately a quarter of surveyed firms in Jordan and Palestine had employees who were persons with disabilities



Source: Employer Survey. N=222 (Jordan: 124; Palestine: 98).



At the time of the survey, which was conducted a year and a half into the pandemic, 28% of surveyed youth in Jordan and 32% of surveyed youth in Palestine indicated that they were working (Figure 17). When asked about their employment activities at the start of the pandemic, 25% of surveyed youth in Jordan and 34% of surveyed youth in Palestine indicated that they were working at that time.

There was surprisingly no statistically significant change in overall employment rates among surveyed youth in Jordan or Palestine at the time of the survey compared to the start of the pandemic. However, this was not as a result of youth remain-

ing in the same employment throughout the entire period. In the case of Jordan, 14% of youth were working at the start of the pandemic but were no longer working at the point of survey administration, whereas 17% of youth who were not working at the start of the pandemic began working thereafter and were employed at the time of the survey. A small share (2%) were working at the start of the pandemic but were in new jobs at the point of survey administration.

In Palestine, 14% of youth were working at the start of the pandemic and were no longer working at the point of survey administration, whereas 12% of youth were not working at the start of the

Figure 16: Three in four surveyed Palestinian firms did not employ any persons with disabilities prior to the pandemic or a year and a half into it, and 4% of firms decreased the share of employees who were persons with disabilities between the two points in time

Palestine		% Employees with Disabilities a Year and a Half into the Pandemic											
		0%	1-9%	10-19%	20-29%	30-39%	40-49%	50-59%	60-69%	70-79%	80-89%	90-99%	100%
% Employees with Disabilities Pre-COVID	0%	75%											
	1-9%	1%	19%										
	10-19%		2%										
	20-29%				1%								
	30-39%					1%							
	40-49%												
	50-59%												
	60-69%							1%					
	70-79%												
	80-89%												
	90-99%												
	100%												

- Firm increased the share of employees who are persons with disabilities
- Firm maintained the same share of employees who are persons with disabilities
- Firm decreased the share of employees who are persons with disabilities

Source: Employer Survey. N=98. Additionally, 1% of the employer respondents indicated that they did not know the percentage of employees who were persons with disabilities currently or prior to the COVID-19 crisis. The percentages in the table have been rounded to the nearest whole number in order to facilitate presentation. A total of 95% of Palestinian employers surveyed maintained the same percentage of persons with disabilities among their staff during the first year and a half of the pandemic.



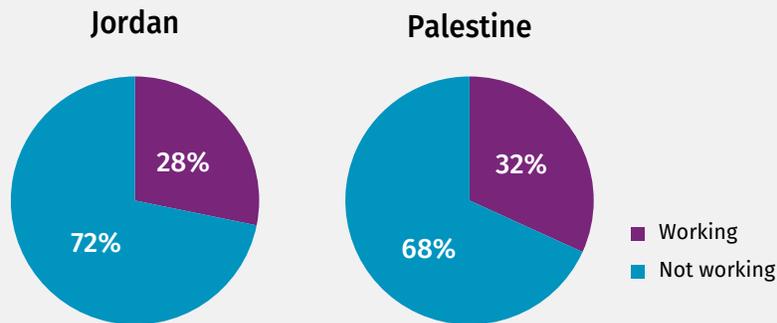
pandemic but were working at the time of survey administration. A small share was working at the start of the pandemic but had transitioned into new jobs by the time of survey administration (4%).

The lack of statistically significant change in overall employment rates among surveyed youth at the start of the pandemic compared to a year and a half into it may be due, in part, to the points in time at which surveyed youth completed EFE trainings. The majority of youth entering EFE trainings aim to secure employment following completion of the trainings. Youth surveyed under this study completed EFE trainings between the first quarter of 2019 through the first quarter of 2021. Graduates of programming in the latter part of 2019 would have had limited time to find a job prior to the start of the pandemic, and those pursuing training in 2020 through the first quarter of 2021 would have faced challenges in entering the job market given the economic impacts of COVID-19.

The employment rates were also likely affected by the makeup of the sample, which included youth who completed different types of EFE training, including Job Training and Placement (JTP), Entrepreneurship, and Pathways to a Job. JTP provides youth with the needed soft, and sometimes technical skills, to succeed in the workplace and involves direct job placement support. Entrepreneurship training prepares youth to succeed in creating and managing their own businesses or self-employment activities, and often involves post-training support in the form of connections to microfinance institutions, toolkits, and startup grants. Pathways to a Job training focuses on equipping youth with the skills needed to search for a job following the training.

Regular EFE program monitoring results indicate that among graduates of JTP programming delivered during the same period as that which the sample was selected, 63% of program graduates in Jordan and 87% in Palestine secured employment. As such, the lower employment rates re-

Figure 17: A year and a half into the pandemic, approximately one in three surveyed youth in Jordan and Palestine were working



Source: Youth Survey. N=774 (Jordan: 381; Palestine: 393).



recorded under this study could reflect the importance that job placement support plays in easing youth transitions into the workforce following the completion of skills training.

In addition to inquiring about employment activities, youth were also asked about their current academic pursuits. In Jordan, 11% of youth respondents indicated that they were studying a year and a half into the pandemic, with no statistically significant difference between Jordanian and refugee youth. Among those who were currently studying, 23% indicated that they were also working.

Youth respondents in Palestine were 73% more likely than their peers in Jordan to be studying (19% vs. 11%, respectively) and youth in Gaza were nearly twice as likely as their peers in the West Bank to be studying (20% compared to 11%, respectively). Of the 19% of youth in Palestine who were studying, 27% indicated that they were also working.

The relatively small share of surveyed youth in Jordan and Palestine who were studying in lieu of working indicates that factors other than studying have prevented youth from entering the labor market. This topic is examined in detail in the *Obstacles to Finding a Job* section.

Effects of Vulnerability on Youth Employment

The results of the youth survey demonstrate the extent to which employment outcomes during the pandemic varied between young men and women, Jordanian and refugee youth, and youth living in the West Bank versus Gaza (Figure 18).

In Jordan, there were no statistically significant differences in employment rates between young men and women at the start of the pandemic, but

the gap widened significantly a year and a half into it. By that point, young men were more than twice as likely as young women to be working. In addition, young men were more than twice as likely as young women to have maintained the same employment from the start of the pandemic through a year and a half into it (17% compared to 7% of young women) and to have been working a year and a half into the pandemic despite not working at its start (34% compared to 13% of young women).

The gender differential in employment outcomes was also observed in Palestine. Although there was no statistically significant increase in employment rates for young men or women in Palestine between the beginning of the pandemic and the time of the survey, young men maintained a significant lead over their female peers. Specifically, young men were between 59%-82% more likely to be employed than young women at the two points in time.

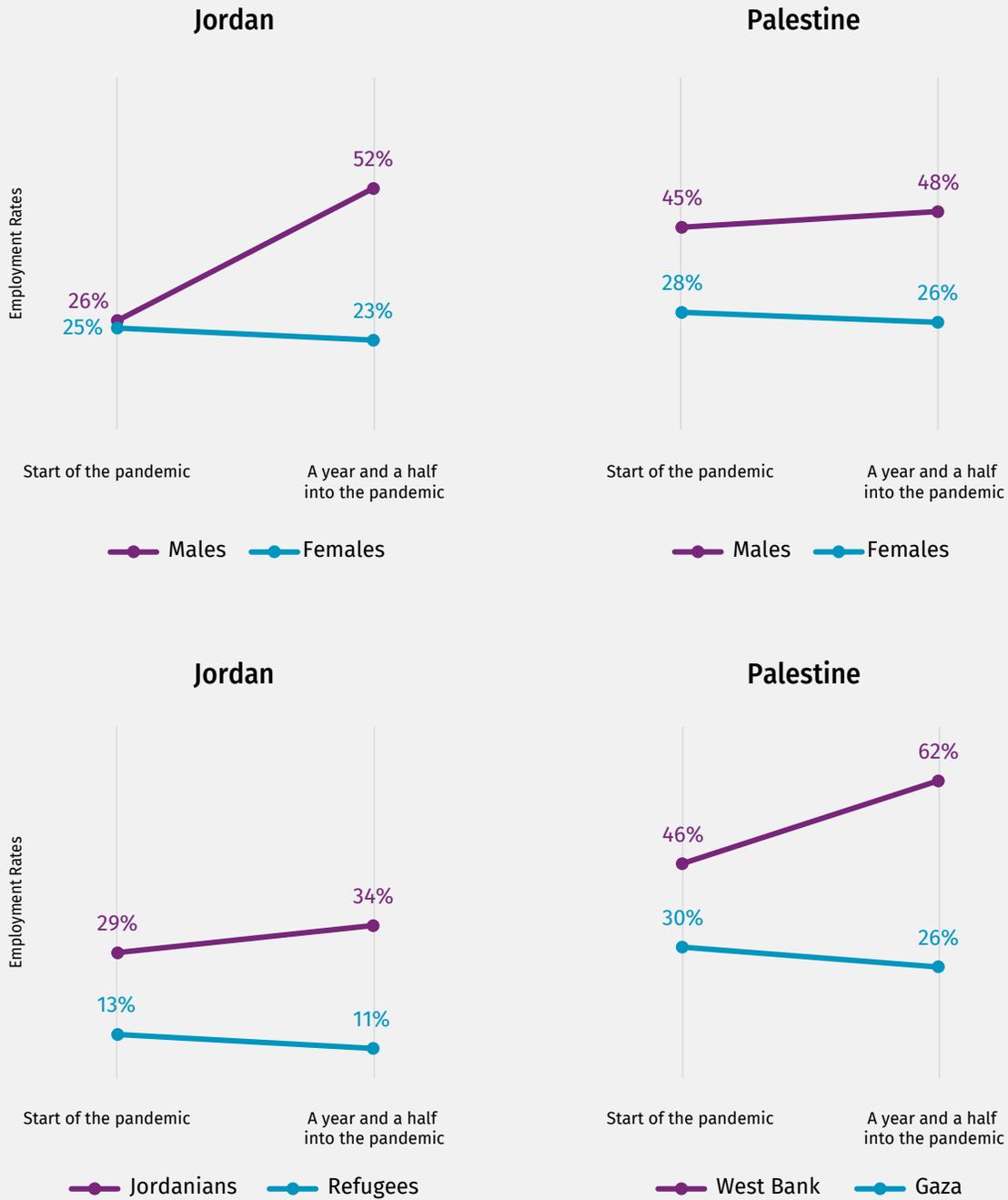
In addition, young men were more than twice as likely as young women to have maintained the same employment from the start of the pandemic through a year and a half into it (25% compared to 11%) and were 66% more likely than young women to have been working a year and a half into the pandemic despite not working at its start (18% compared to 11%). In addition, young women were 63% more likely than young men to have been unemployed both at the start of the pandemic and a year and a half into it (61% of young women compared to 38% of young men).

As such, in both Jordan and Palestine, young men experienced consistently more favorable employment outcomes than their female peers.

Similar patterns were observed between Jordanians and refugees in Jordan. Although there was no statistically significant change in employment



Figure 18: Employment gaps driven by differences in gender, location, and refugee status remained stubbornly high among youth respondents at the start of the pandemic and a year and a half into it, and overall youth employment rates remained low



Source: Youth Survey. Total N=774. Jordan: N=381 (Females: 297; Males: 84; Jordanian: 285; Refugees: 96). Palestine: N=393 (Females: 270; Males: 123; West Bank: 82; Gaza: 311).



In both Jordan and Palestine, young men experienced consistently more favorable employment outcomes than their female peers

rates for Jordanian or refugee youth between the beginning of the pandemic and a year and a half into it, Jordanians were between two and three times as likely as refugees to be employed. In addition, Jordanians were more than three times as likely as refugees to have maintained the same employment during the first year and a half of the pandemic (11% compared to 3%) and were nearly three times as likely as refugees to have been working a year and a half into the pandemic despite not working at its start (20% compared to 7%). Refugee youth were 56% more likely than Jordanians to have been unemployed both at the start of the pandemic and a year and a half into it (80% of refugees compared to 51% of Jordanians).

Similarly, in Palestine, although the changes in employment rates between the start of the pandemic and a year and a half in were not statistically significant, youth in the West Bank maintained a significant employment lead of between 54% and 137% over their peers in Gaza. Youth in the West Bank were also more likely than their peers in Gaza to have maintained the same employment during the first year and a half of the pandemic (22% compared to 14%), to have been working at the start of the pandemic and been in a new position a year and a half into the pandemic (13% compared to 3%), and to have been working a year and a half into the pandemic despite not working at its start (26% compared to 10%). Meanwhile, youth in Gaza were more than twice as likely as their peers in the West Bank to

have been unemployed both at the start of the pandemic and a year and a half into it (60% compared to 27%).

These persistent disparities in employment outcomes despite the provision of workforce development programming suggests that more targeted, wraparound services could be helpful in closing the employment gap for refugees, women, and youth in Gaza during the COVID-19 recovery.

Youth Employment Types

At the time of the survey, employed youth in both Jordan and Palestine were most likely to be working in full-time positions, followed by self-employment and part-time positions. Employed youth in Jordan were nearly 40% more likely than those in Palestine to be working in full-time positions (Figure 19).

Despite the lower employment rates for vulnerable populations discussed above, there was no statistically significant difference in employment types in Jordan according to gender or between Jordanian and refugee youth at the time of the survey. However, the absence of significant differences found between Jordanian and refugee youth may be due to the small number of refugees in the sample who indicated that they were currently working (11 individuals).

Data pertaining to employment types at the start of the pandemic suggest that refugee youth may be less likely to hold full-time positions than their Jordanian peers. Among Jordanian youth who were working at the start of the pandemic, 71% indicated that they were working full-time compared to just 38% of refugee respondents. However, the small number of refugee youth who indicated that they were working at the start of the pandemic (13 individuals) limits the potential to draw conclusions from the data.



Youth in Gaza were more likely than their peers in the West Bank to be working in less secure forms of employment, both before the pandemic and a year and a half into it

In Palestine, young women were more likely to be working in paid internships than young men a year and a half into the pandemic, though the share remained small at only 7% of employed young women and 1% of employed young men.

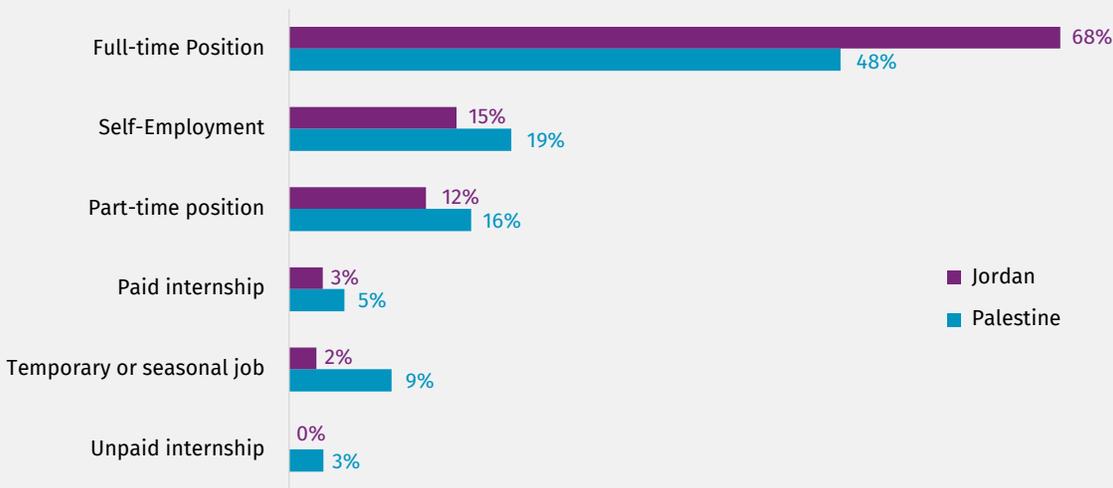
An analysis of job placement types held by youth in Palestine reveals that youth in Gaza were more likely to be working in less secure forms of em-

ployment than their peers in the West Bank, both before the pandemic and a year and a half into it.

Youth in the West Bank were 73% more likely than their peers in Gaza to be working in full-time positions a year and a half into the pandemic, while youth in Gaza were nearly twice as likely as their peers in the West Bank to be working on self-employment activities. Youth in Gaza were also more likely than their peers in the West Bank to be working in part-time positions, temporary/seasonal jobs, and paid internships.

At the start of the pandemic, employed youth in the West Bank were 91% more likely than their peers in Gaza to be working in full-time positions, and employed youth in Gaza were more than twelve times as likely as their peers in the West Bank to be working in temporary or seasonal positions. As such, although the pandemic exacerbated the youth employment challenge in Gaza, young Gazans were already struggling to secure

Figure 19: Youth who were employed a year and a half into the pandemic were most likely to be working in full-time positions



Source: Youth Survey. N=246 (Jordan: 110; Palestine: 136).



stable employment arrangements prior to the COVID-19 crisis (Figure 20).

The study sought to understand the extent to which the pandemic had an effect on the terms of employment offered to youth and the role that varying position types had on the stability of youth employment following the start of the pandemic. Variation in the distributions of position types that youth started and left during different points in the crisis were analyzed, including:

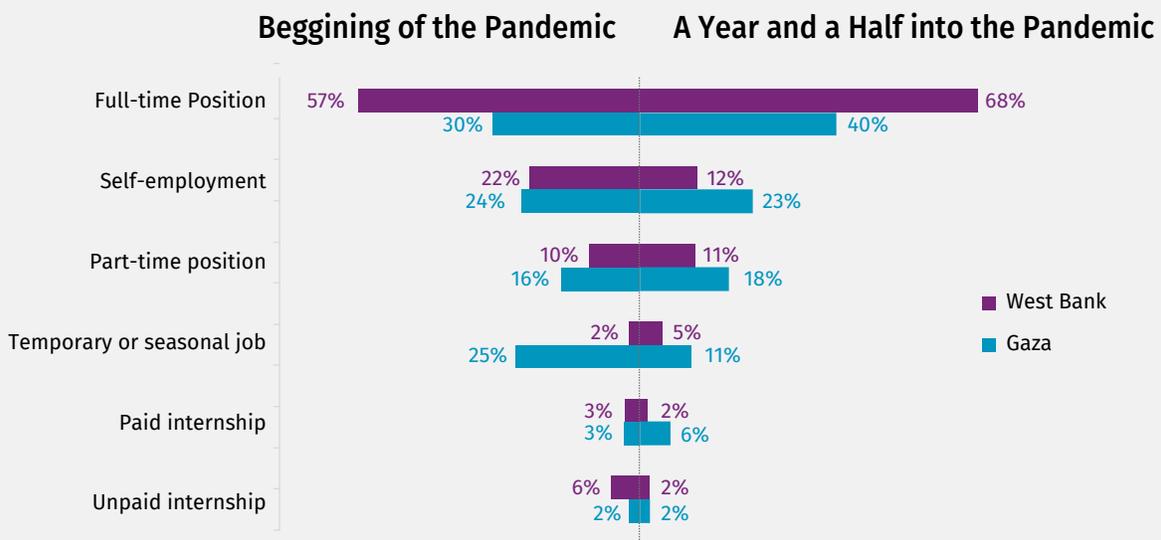
- jobs that youth held at the beginning of the pandemic but left prior to survey administration, which occurred a year and a half after the start of the crisis
- jobs that youth held at the beginning of the pandemic and maintained through survey administration
- jobs that youth began following the start of the pandemic and maintained through survey administration

Due to sample size limitations, analysis was limited to averages at the national level.

The results of the analysis suggest that in both Jordan and Palestine, there has not been a significant shift in the share of position types available to youth during the pandemic compared to the period prior. Specifically, there were no statistically significant differences found in the distribution of position types held by youth who were working at the start of the pandemic compared to those who secured and maintained new employment thereafter. This suggests that although the pandemic has made it more challenging for youth to secure employment, their likelihood of securing different position types (e.g., full-time, part-time) does not appear to have changed.

Regarding the role that varying position types had on the stability of youth employment following the initial outbreak of COVID-19, in Jordan, the only significant finding pertained to paid intern-

Figure 20: Youth in Gaza were more likely than their peers in the West Bank to be working in less secure forms of employment, both before the pandemic and a year and a half into it



Source: Youth Survey. Beginning of the pandemic: N=133 (West Bank: 35; Gaza: 98). A year and a half into the pandemic: N=136 (West Bank: 53; Gaza: 83).



ship positions. Among surveyed youth, 9% held paid internships at the start of the pandemic but left them prior to survey administration, whereas none of the youth who maintained the same position during the first year and a half of the pandemic were working in paid internships. This difference points to the limited longevity of these positions, which is not surprising given that they are typically designed to be temporary. Youth in Jordan appear to have continued to have access to paid internships during the pandemic, however, as 4% of surveyed youth who secured new positions following the initial outbreak of COVID-19 indicated that they were working in this type of position.

In Palestine, temporary/seasonal jobs accounted for 7% of positions maintained throughout the first year and a half of the pandemic and 31% of positions held at the beginning of the pandemic but not maintained. The small share of youth who maintained the same temporary/seasonal jobs throughout the pandemic is not surprising given that these positions are short-term by nature. However, this finding does support the supposition that more stable position types can offer significant benefits to the economic wellbeing of youth.

Youth Contract Types

Youth who were engaged in wage employment or internships were asked to specify the contract type that they had with their employer. Limited term contracts were most common among surveyed youth who were working a year and a half into the pandemic, accounting for 47% of those in Jordan and 39% in Palestine. Unlimited term contracts were less common, particularly in Jordan, accounting for 26% of youth engaged in wage employment or internships in Jordan and 31% in Palestine.

The relatively large share of surveyed youth who were working without a formal contract was notable. In Jordan, 24% of youth engaged in wage employment or internships a year and a half into the pandemic were working informally, as were 29% in Palestine. An additional 3% of these youth in Jordan and 1% in Palestine were working under daily rate contracts. Youth were given the option to indicate that they were working under freelance or gig employment arrangements, but none selected this response. There were no statistically significant differences in the share of youth working under each contract type between Jordan and Palestine, young men and women, Jordanian and refugee youth, or youth living in the West Bank versus Gaza (Figure 21).

As with the preceding analysis on position types, the study sought to understand the extent to which the pandemic had an effect on the terms of employment offered to youth and the role that varying contract types had on the stability of youth employment following the start of the pandemic. The breakdowns analyzed fell into the same three groups as those considered for the position type analysis, detailed in the section above. Due to sample size limitations, analysis was limited to averages at the national level.

Consistent with the findings regarding position types discussed in the previous section, the analysis suggests that there has not been a shift in the share of contract types available to youth in Jordan and Palestine during the pandemic compared to the prior period. Specifically, there were no statistically significant differences found in the distribution of contract types held by youth who were working at the start of the pandemic compared to those who secured and maintained new employment thereafter. As with the discussion around position types, this suggests that the increasing difficulty that youth have faced in finding



employment during the pandemic has not been accompanied by a shift in contract types offered.

In Jordan, the analysis suggests that jobs offering unlimited term contracts provide the greatest amount of stability for young people, including – or perhaps, especially – during turbulent periods such as the pandemic. Among jobs that youth held at the beginning of the pandemic and maintained through survey administration, 39% offered unlimited term contracts. Conversely, among positions that youth held at the beginning of the pandemic but left prior to survey administration, only 7% offered unlimited term contracts. This difference underscores the importance that unlimited term contracts can play in increasing employment stability for youth, and is highly relevant given that the majority of youth work under less secure contract types.

A similar pattern was found in Palestine. Among jobs that youth held at the beginning of the pandemic and maintained through survey administration,

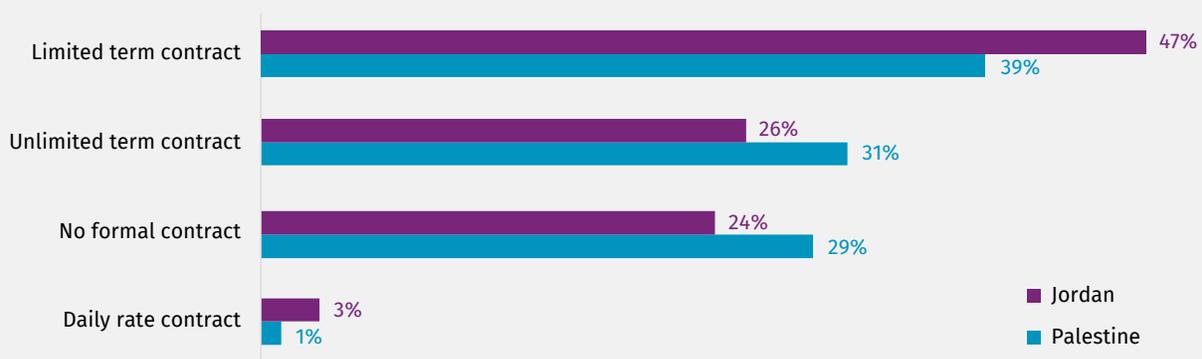
30% offered unlimited term contracts, compared to just 9% of jobs that did not last through survey administration. As with Jordan, it appears that youth working under unlimited term contracts likely benefit from greater job stability than their peers working under other contract types.

Sectors and Industries of Employment

At the point of survey administration, youth working in wage employment or internships were engaged across a wide range of sectors and industries. Youth in Jordan were most commonly employed in ICT, factory production, and education/academia. The most common fields of employment in Palestine were medical/health services, advertising/marketing/PR, and education/academia. There were no statistically significant differences in field of employment between Jordan and Palestine (Figure 22).

It is important to note that the distribution of sectors and industries in which youth were employed

Figure 21: A year and a half into the pandemic, youth engaged in wage employment or internships in both Jordan and Palestine were most likely to have limited term contracts, and around one in four were working informally



Source: Youth Survey. N=204 (Jordan: 94; Palestine: 110). This question was not posed to youth who indicated that they were self-employed.

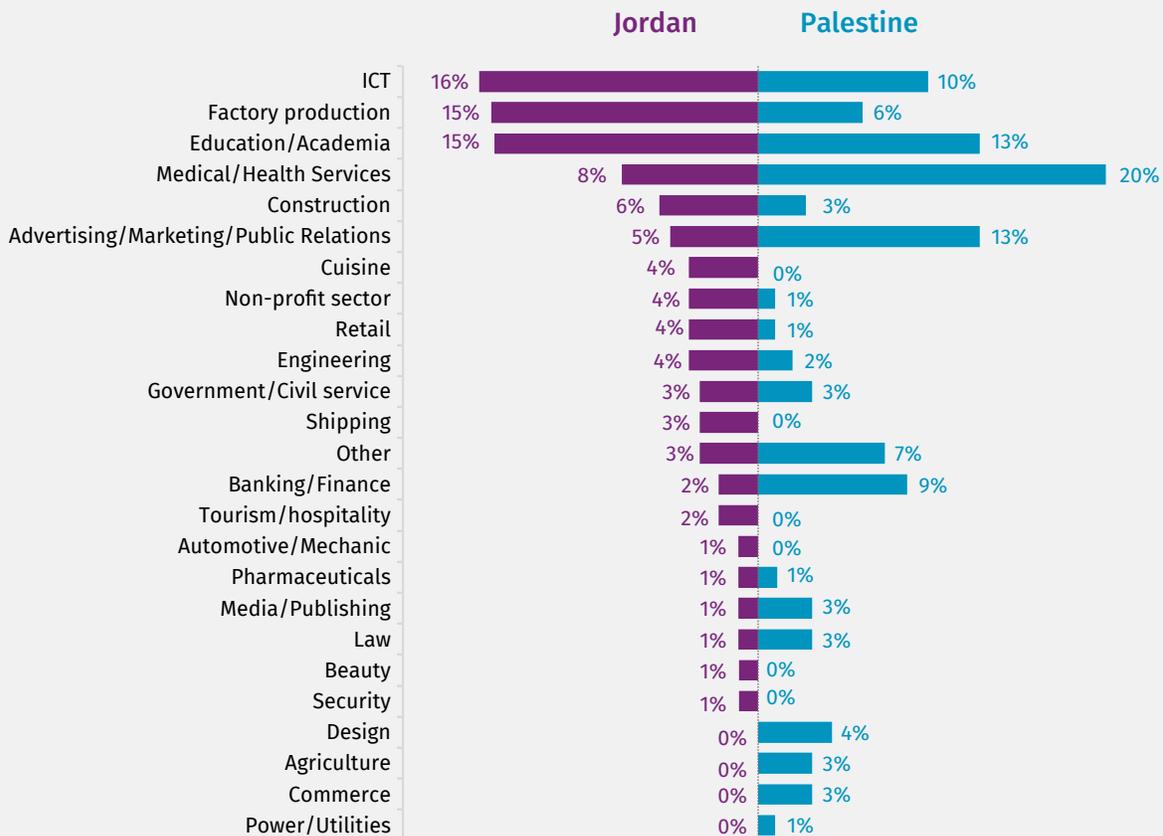


is partly a function of the fields on which EFE focused its JTP trainings during the sample period. For example, trainings have focused on factory production in Jordan and health services in Palestine, which constitute two of the most represented fields of employment in the sample. As such, the distribution of sectors and industries of employment for this sample is likely not representative of the distribution for the overall youth populations in Jordan and Palestine. However, it is helpful to consider this distribution when in-

terpreting the other results gathered from the youth survey.

At the time of the survey, young men in Jordan were significantly more likely than young women to work in construction (16% vs. 0%), retail (11% vs. 0%), and engineering (11% vs. 0%). In Palestine, young men were significantly more likely than young women to work in banking/finance (17% vs. 3%) and construction (7% vs. 0%), whereas young women were significantly more likely to

Figure 22: Among surveyed youth in Jordan and Palestine, the most common fields of employment a year and a half into the pandemic were ICT, factory production, education/academia, and medical/health services



Source: Youth Survey. N=204 (Jordan: 94; Palestine: 110). Youth were prompted to select up to two industries. The distribution of sectors in which youth are employed is partly a function of the sectors on which EFE focused its JTP trainings during the sample period.



work in education/academia (20% of women vs. 2% of men).

In addition, Jordanians were significantly more likely to work in ICT than refugees, with 17% of Jordanians indicating that they worked in the sector compared to 0% of refugees. Jordanians were also more likely to work in medical/health services (8% vs. 0%), cuisine (5% vs. 0%), engineering (4% vs. 0%), and retail (4% vs. 0%), though they did not constitute common sectors of employment overall.

Youth in the West Bank were twice as likely as those in Gaza to be working in medical/health services (31% vs. 15%) and youth in Gaza were more likely than those in the West Bank to be working in the design field (6% in Gaza vs. 0% in the West Bank), though it was not a common sector of employment.

There was no statistically significant difference between the sectors and industries in which employed youth worked at the start of the pandemic compared to a year and a half into it in either Jordan or Palestine.

The number of youth engaged in self-employment activities at the time of the survey and at the start of the pandemic was relatively small, making the following discussion of their sectors of operation illustrative in nature.ⁱⁱ Among self-employed youth, the most common sector of operation at the time of the survey was education/academia, making up 25% of surveyed youth businesses in Jordan and 31% in Palestine. Advertising/marketing/PR was also a common sector, comprising 25% of youth businesses in Jordan and 12% in Palestine. The related field of design made up an additional 12% of businesses in Palestine but was

uncommon in Jordan. In Jordan, crafts/arts made up an additional 19% of businesses and cuisine made up 13%, sectors that were not common in Palestine.

Youth Occupations

The youth survey asked respondents to provide their job title, which was then categorized according to the International Standard Classifications of Occupations (ISCO) of the ILO¹³⁰ for this analysis. As with sector and field of employment, the distribution of occupations in which youth are employed is partly a function of the sectors on which EFE focused its JTP trainings during the sample period.

A year and a half into the pandemic, youth in Jordan were most likely to be working as business and administration associate professionals, teaching professionals, personal service workers, and information and communications technicians. In Palestine, youth were most likely to be working as health professionals, business administration professionals, and teaching professionals. Youth in Palestine were statistically more likely than those in Jordan to be working as health professionals, and youth in Jordan were statistically more likely than those in Palestine to be working as personal service workers (Figure 23).

Although there was no statically significant change in the overall distribution of occupations among youth in Jordan and Palestine at the start of the pandemic compared to a year and a half into it, some variation was detected between strata at each point in time.

An analysis of the occupations that young men and women held at the start of the pandemic and

ii In Jordan, 16 youth indicated that they were working in self-employment at the time of the survey and eight indicated that they were engaged in self-employment at the start of the pandemic. In Palestine, 26 youth indicated that they were working in self-employment at the time of the survey, compared to 19 at the start of the pandemic.

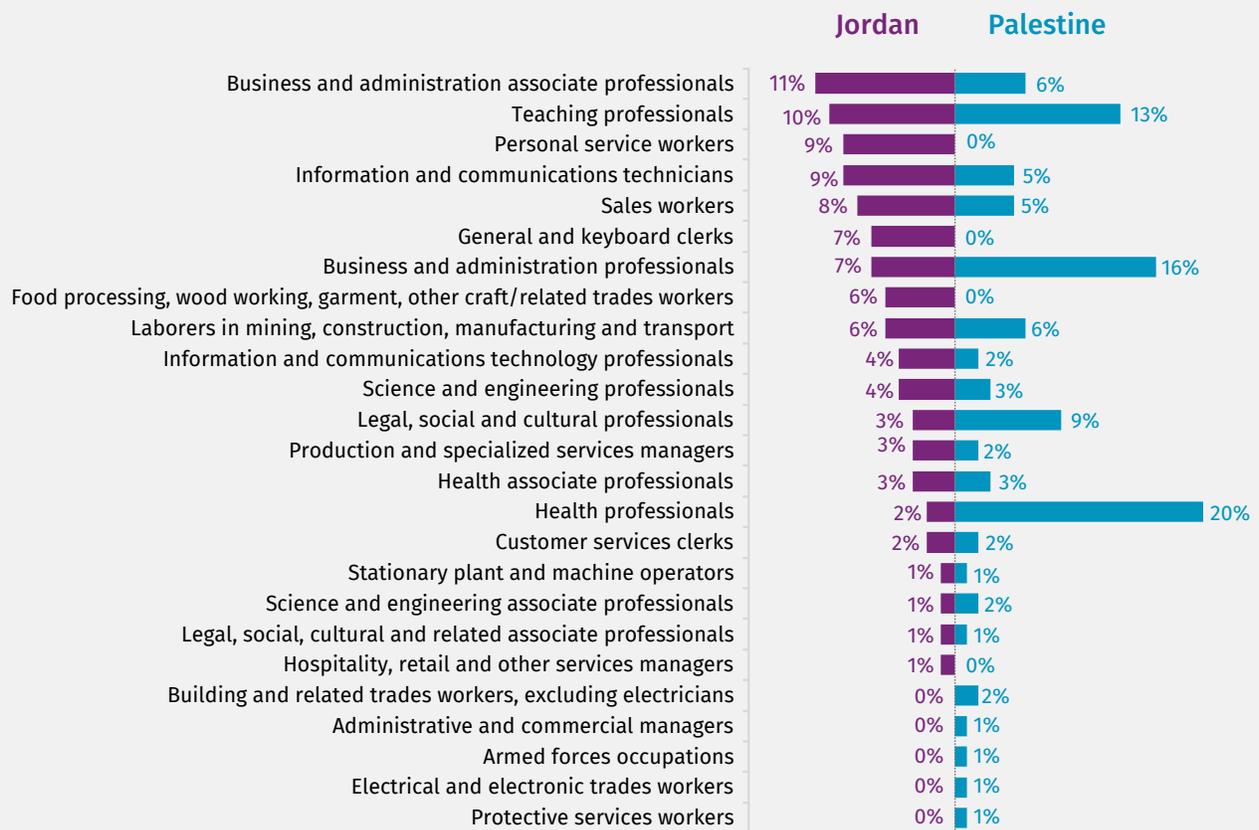


a year and a half into it revealed gendered patterns of employment in some cases. Young men in Jordan were more likely than young women to be working as sales workers at the start of the pandemic (28% compared to 10%) and a year and a half into it (19% compared to 0%). Similarly, young men were more likely than young women to be working as science and engineering professionals at the start of the pandemic (11% compared to 0%) and a year and a half into it (11% compared to 0%). In addition, at the start of the pandemic, young women were more likely than young men to be working as food processing, wood working,

garment and other craft and related trades workers (23% compared to 0%).

In Palestine, young men were more likely than young women to be working as laborers in mining, construction, manufacturing, and transport at the start of the pandemic (22% compared to 0%) and a year and a half into it (13% compared to 0%). For their part, young women were more likely than young men to be working as teaching professionals at the start of the pandemic (25% compared to 6%) and a year and a half into it (23% compared to 2%).

Figure 23: Youth who were employed in Jordan and Palestine a year and a half into the pandemic were working in a wide range of occupations



Source: Youth Survey. N=194 (Jordan: 89; Palestine: 105). The distribution of occupations in which youth are employed is partly a function of the sectors on which EFE focused its JTP trainings during the sample period.



These tendencies point to the potential for youth workforce development programming to work with youth, particularly young women, to expand their perspectives on their potential to succeed in non-traditional career paths. This may also point to the potential to collaborate with employers on implementing diversity recruitment strategies in some cases.

Regarding refugee employment in Jordan, refugee youth were more than four times as likely as Jordanians to be working as personal service workers at the start of the pandemic (30% compared to 7%). A year and a half into the pandemic, refugee youth were significantly more likely than Jordanian youth to be working as laborers in mining, construction, manufacturing, and transport (43% compared to 2%) and Jordanian youth were more likely than refugee youth to be working as teaching professionals (11% compared to 0%). These employment patterns reflect the sectors within which Syrians are permitted to work in Jordan.

Differences in occupations were also detected in the West Bank and Gaza. A year and a half into the pandemic, youth in the West Bank were significantly more likely than those in Gaza to be working as health professionals (31% compared to 12%) whereas youth in Gaza were more likely than those in the West Bank to be working as legal, social, and cultural professionals (15% compared to 0%) and as business and administration professionals (22% compared to 9%). The larger share of youth in the West Bank who work in healthcare is reflective of the larger number of opportunities available in the sector within the West Bank compared to Gaza.

Youth Incomes

Employed youth were asked if their income had been sufficient to cover all of their basic needs each month since the start of their employment.

Basic needs were described as covering essentials like groceries and transportation. Among youth employed a year and a half into the pandemic, youth in Jordan were 62% more likely than youth in Palestine to indicate that their incomes never met their basic needs. By contrast, youth in Palestine were more than five times as likely as youth in Jordan to indicate that their incomes covered their basic needs all the time (Figure 24).

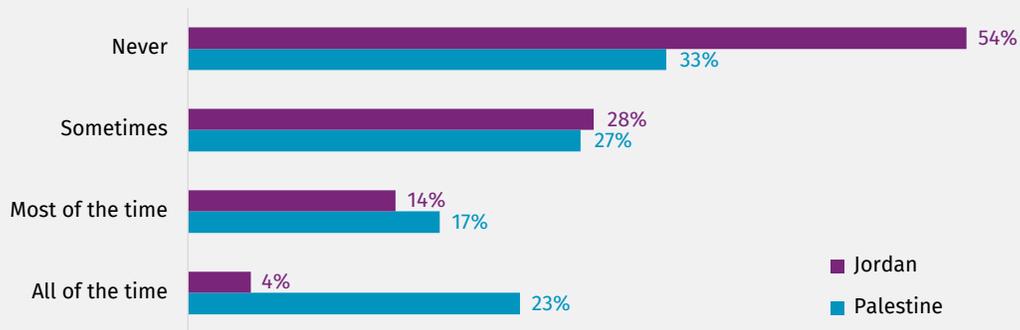
The differences in responses between Jordan and Palestine may reflect the relatively higher educational attainment of the individuals who participated in the survey in Palestine compared to Jordan. In Palestine, 83% of respondents had at least a university-level degree, compared to 45% of respondents in Jordan. A higher level of education would likely increase access to higher paying job opportunities in some cases. The differences in responses may also reflect variation in the cost of living in Jordan and Palestine relative to the minimum wage.

There were no statistically significant differences between young women and men in Jordan or Palestine regarding the extent to which they felt their incomes were sufficient to cover their basic needs. There were also no significant differences between Jordanian and refugees youth in this regard. In addition, no relationship was found between the position type that youth held (i.e., full-time, part-time, etc.) and the likelihood that youth felt their income was sufficient.

Within Palestine, youth in the West Bank who were employed a year and a half into the pandemic were significantly more likely than their peers in Gaza to indicate that their incomes covered their basic needs each month. In the West Bank, 60% of employed youth indicated that their income was sufficient most or all of the time, compared to just 31% of youth in Gaza (Figure 25).

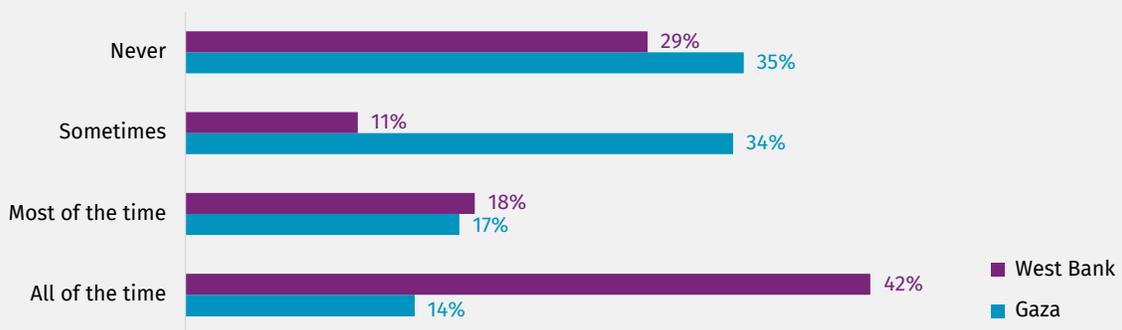


Figure 24: A year and a half into the pandemic, a significant share of employed youth in Jordan and Palestine indicated that their incomes were insufficient to cover their basic needs each month



Source: Youth Survey. N=246 (Jordan: 110; Palestine: 136).

Figure 25: A year and a half into the pandemic, employed youth in the West Bank were nearly twice as likely as those in Gaza to indicate that their incomes were sufficient to cover their basic needs most or all of the time



Source: Youth Survey. N=136 (West Bank: 53; Gaza: 83).



Survey results indicate that youth perspectives regarding the insufficiency of their incomes may not have resulted from the pandemic. For both Jordan and Palestine, there was no statistically significant difference in opinions on this matter between youth employed at the start of the pandemic and those employed a year and a half into it. There were also no statistically significant differences based on whether their income was gained from positions that they held at the start of the pandemic and maintained through a year and a half into it, positions that they held at the start of the pandemic but left, or positions that they started after the beginning of the pandemic. This likely points to the existing challenges that youth experience more generally with regards to the sufficiency of entry-level wages.

The results also suggest that there may be a gender dimension to the sufficiency of income that youth receive from their employment. Among youth in Jordan who were employed at the start of the pandemic, young women were nearly three times as likely as young men to indicate that their income was never sufficient (61% compared to 22%). Conversely, among young men, 32% indicated that their income was sufficient most or all of the time, compared to just 14% of young women.

In Palestine, youth employed at the start of the pandemic in Gaza were more than three times as likely as those in the West Bank to indicate that their income was sufficient only some of the time (26% compared to 8%). In the West Bank, 51% of youth indicated that their income was sufficient most or all of the time compared to 39% in Gaza.

Changes in Youth Income

Youth who maintained the same position since the start of the pandemic through a year and a half into it were asked if their current monthly income differed from the monthly income that they

earned immediately prior to the COVID-19 crisis. A large share of youth indicated that their monthly income had stayed the same (70% in Jordan and 45% in Palestine), and some even experienced increases (11% in Jordan and 24% in Palestine). However, 19% in Jordan indicated that they experienced decreases in their income, as did 31% in Palestine.

Youth Contributions to Households

Employed youth were asked what percentage of their income they had provided to their household each month, on average, since beginning their employment. In Jordan, 67% of youth who were employed a year and a half into the pandemic indicated that they give at least some of their income to their household each month, as did 59% of youth in Palestine. There was no statistically significant difference between youth in Jordan and Palestine in this regard (Figure 26).

In Jordan, employed young men were more likely than employed young women to report giving larger amounts of their incomes to their households. Among employed young men, 68% reported giving more than 20% of their incomes to their households, compared to 36% of young women. Employed young women were more likely than employed young men to report giving between 1-20% of their incomes to their households (28% of young women vs. 4% of young men).

In Palestine, there were no statistically significant differences between the contributions that young men and women reported making to their households. However, employed youth in Gaza were 52% more likely than those in the West Bank to indicate that they provided at least some amount of their income to their households each month.

Between youth employed in Jordan at the start of the pandemic and those employed a year and



a half into it, there were no statistically significant differences in the average share of their incomes that they contributed to their households during their employment. The same was true for youth surveyed in Palestine. This suggests that the pandemic may not have led employed youth to provide greater shares of their incomes to their households than they would have otherwise.

It is important to note that the survey did not inquire about respondent marital status, which would be likely to affect responses to this question. However, it is likely that married respondents who live in separate households from their mother, father, and siblings would indicate that they give 100% of their incomes to their households. Given that the majority of respondents indicated that they give less than 100% of their income to their households, it is likely that the responses to this question reflect the extent to which youth share income with their families of origin.

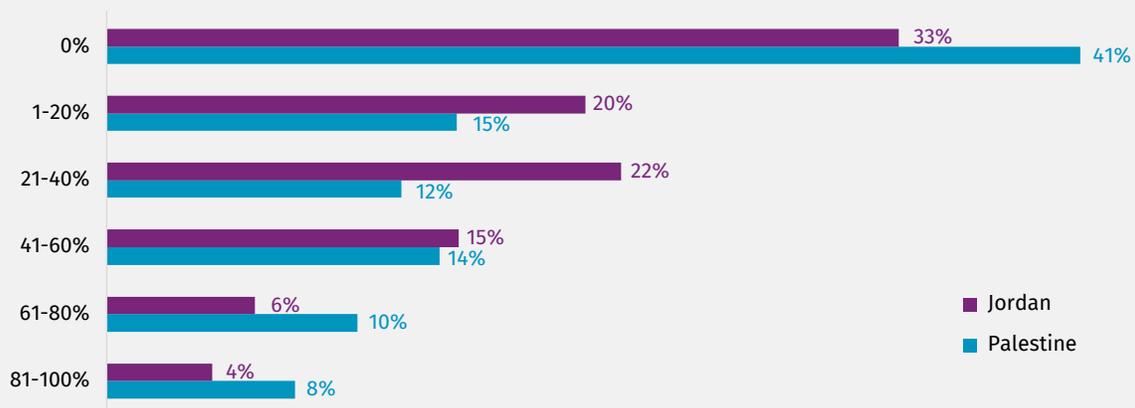
Youth Tasks and Hours

Youth who maintained the same job throughout the first year and a half of the pandemic were asked if their tasks on-the-job had changed significantly compared to the period immediately prior to the COVID-19 crisis. Most youth indicated that their tasks had not changed, including 92% of youth in Jordan and 83% in Palestine (Figure 27).

Youth who indicated that they had experienced a change were asked about those changes. In Jordan, youth indicated that work pressure had increased, and one noted that he needed to get a second job as a result of the pandemic in order to support himself and his family.

Youth in Palestine also noted that the pressure of work had increased, including increased hours and tasks in some cases. One respondent in the medical field noted that his hours had increased and the amount of work had expanded. However,

Figure 26: Most surveyed youth in Jordan and Palestine who were employed a year and a half into the pandemic contributed some part of their income to their households each month since beginning their employment



Source: Youth Survey. N=246 (Jordan: 110; Palestine: 136). Differences between responses in Jordan and Palestine are not statistically significant.



another respondent working as an entrepreneur noted that his hours had gone down.

Youth who were working throughout the first year and a half of the pandemic were asked to indicate the number of hours per week that they worked immediately prior to the COVID-19 crisis as well as the number of hours per week that they worked at the point of survey administration. The analysis found that there was no statistically significant difference in the number of hours youth worked at the two points in time. This was true both for youth who held the same position for the entire period, and for youth who held different positions at the start of the pandemic compared to a year and a half into it.

Reasons Youth Left Employment

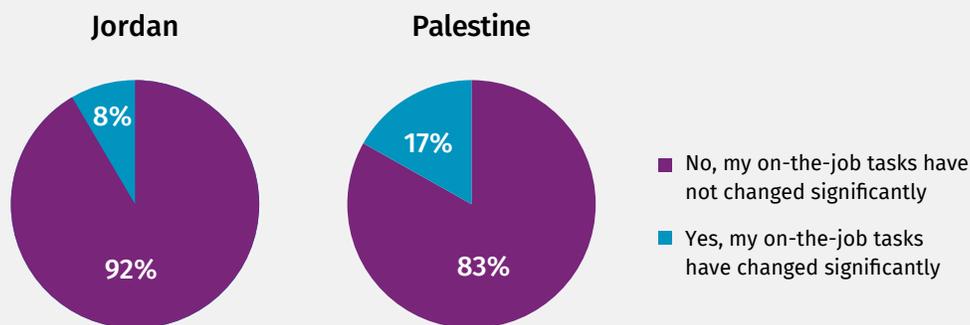
Among youth surveyed in both Jordan and Palestine, 14% had been engaged in wage employment or internships at the start of the pandemic but

left their positions prior to the survey administration. Youth were most likely to indicate that they had left their positions because they were temporary, accounting for 36% of this group in Jordan and 48% of this group in Palestine.

The next most common reasons cited in Jordan were that the job was not sufficiently prestigious, that they were laid off from their job due to COVID-19, and that their employer ceased business activities due to the shutdowns related to COVID-19. In Palestine, the next most commonly cited reasons following the temporary nature of youths' positions were that their employer ceased business activities due to shutdowns related to COVID-19, they were laid off from their job due to COVID-19, and that they were concerned about potential exposure to COVID-19 in the workplace (Figure 28).

The number of youth who were engaged in self-employment activities at the start of the pan-

Figure 27: Most youth in Jordan and Palestine who maintained the same job throughout the first year and a half of the pandemic did not experience a change in their on-the-job tasks compared to the pre-pandemic period



Source: Youth Survey. N=98 (Jordan: 36; Palestine: 62).



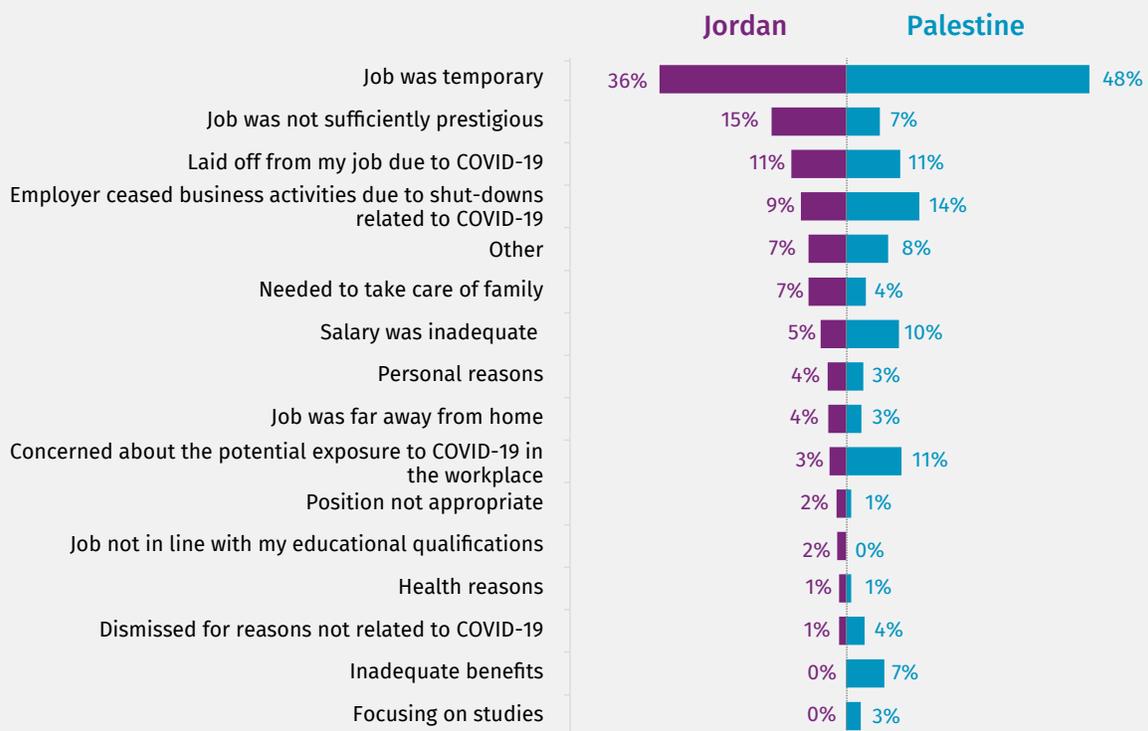
demic and ceased activities was small, consisting of three youth in Jordan and 13 in Palestine. Given the small sample size, the following analysis is only illustrative in nature. Youth in Jordan who ceased business activities cited personal circumstances, the need to take care of family, and the loss of customers due to COVID-19. The individual who indicated that she had stopped business activities due to customer losses indicated that she planned to restart her business in the near future once the COVID-19 crisis improved.

In Palestine, 77% of those who ceased business activities cited COVID-19-related concerns including that their business had lost customers due to the pandemic, that they had ceased activities due to the COVID-19 shutdowns, and that they were

concerned about the potential to be exposed to COVID-19 in the workplace. Others cited reasons including a change in personal circumstances and a lack of business profitability unrelated to the pandemic. Fifty percent of individuals who ceased business activities due to COVID-related concerns indicated that they planned to restart their businesses in the near future once the crisis improved, 30% indicated that they would not, and 20% indicated that they were unsure if they would.

Among youth who held wage or self-employment at the start of the pandemic but then left their employment, it was uncommon to receive government support following termination. In both Jordan and Palestine, only 5% of youth who left their employment following the start of the pandemic

Figure 28: Some youth in Jordan and Palestine who left employment during the pandemic were impacted by COVID-19, but the temporary nature of their employment was a more commonly cited factor for leaving



Source: Youth Survey. N=114 (Jordan: 56; Palestine: 58). Youth were permitted to select up to two responses.



indicated that they received government support.

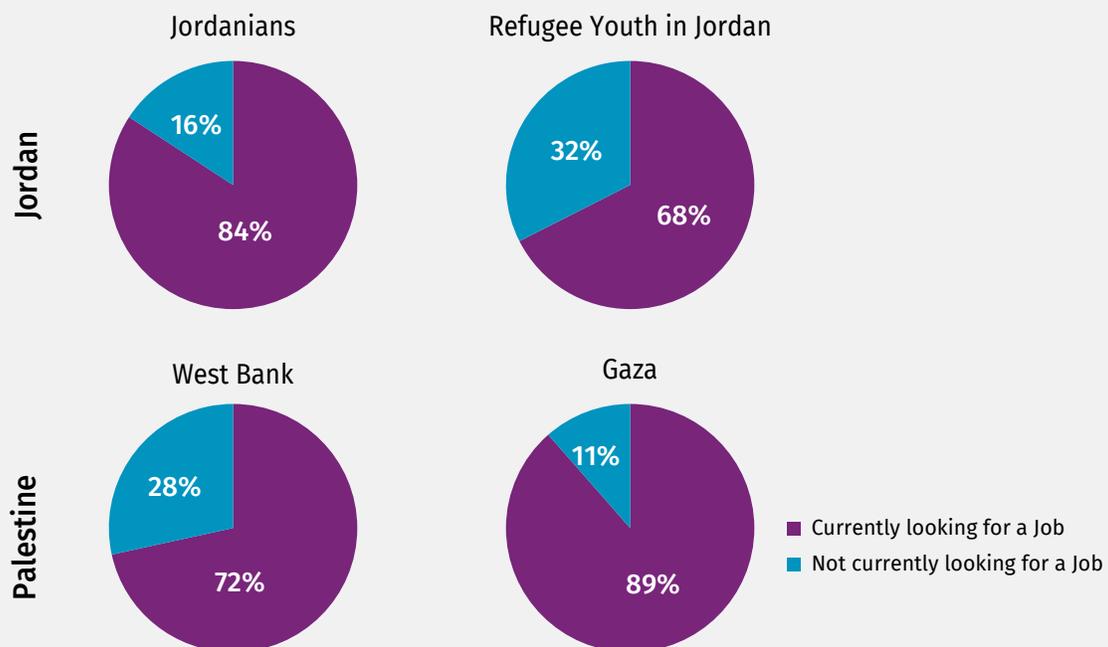
Youth Job Search Behavior

In addition to understanding youth experiences in wage and self-employment, the study aimed to understand job search behavior among the youth who were not currently employed. In Jordan, 79% of youth who were not employed at the time of the survey were looking for jobs, as were 87% in Palestine. There was no statistically significant difference in job search rates between young men and women in either Jordan or Palestine. However, Jordanian youth were more likely than refugee youth to be looking for work, and youth living in Gaza were more likely than those living in the West Bank to be looking (Figure 29).

Among youth who were actively looking for work at the point of survey administration, the majority in both Jordan and Palestine had been looking for work for more than a year, reaching 69% in Jordan and 68% in Palestine (Figure 30). This finding underscores the difficulty that many youth experienced in securing employment during the pandemic.

There were no statistically significant differences between the average amounts of time that youth were looking for work in Jordan and Palestine, nor were there differences in the lengths of time that Jordanian and refugee youth, young men and women in Palestine, or youth in the West Bank and Gaza had been looking for work. However, in Jordan, young women were 43% more likely than

Figure 29: A year and a half into the pandemic, job search rates among youth who were not currently working were highest among Jordanian youth and youth in Gaza



Source: Youth Survey. Total N=528. Jordan: N=271 (Jordanians: 86; Refugees: 85); Palestine: N=257 (West Bank: 29; Gaza: 228).



young men to be looking for work for more than a year (72% of young women compared to 50% of young men).

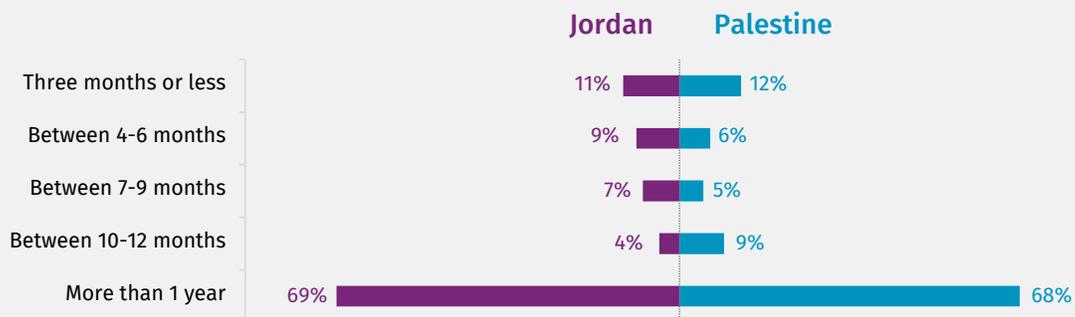
As for job search methods, youth in both Jordan and Palestine were most likely to report having used internet job applications and personal contacts to look for work during the past three months. Youth in Jordan were more likely than youth in Palestine to report that they had emailed employers directly and used career fairs whereas youth in Palestine were more likely to report having used government initiatives and internship programs, though these represented only a small percentage of youth (Figure 31).

In Jordan, young women were more likely than young men to report that they had used direct emails to employers as one of their main job search methods (15% compared to 0%). In Pal-

estine, young men were more likely than young women to use personal contacts as one of their main job search methods (59% of men compared to 40% of women), but they were less likely than young women to use internet job applications as one of their primary methods (82% of men compared to 98% of women).

Differences in job search behaviors between Jordanian and refugee youth were also found. Among Jordanian youth, 18% indicated that they had emailed employers directly as a primary job search method during the past three months, compared to 0% of refugee youth. The use of personal contacts to search for a job was common among refugee youth, with refugees being twice as likely as Jordanians to have used this method to look for a job during the past three months (70% compared to 35%).

Figure 30: A year and a half into the pandemic, nearly seven in ten youth who were looking for work in Jordan and Palestine had been looking for more than a year



Source: Youth Survey. N=438 (Jordan: 215; Palestine: 223).



Obstacles to Finding a Job

Youth who were looking for jobs at the point of survey administration felt that an insufficient availability of jobs was the principal obstacle that had prevented them from finding employment. However, varying levels of vulnerability among youth appear to have affected the extent to which they felt that COVID-19 was the reason behind the shortage.

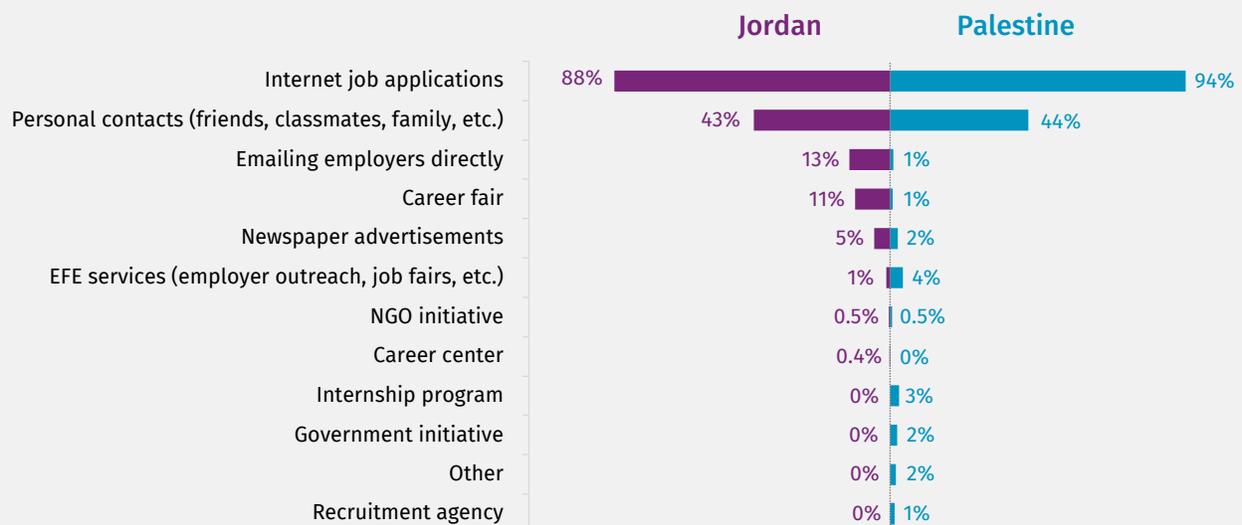
Unemployed youth in Jordan were seven times as likely as unemployed youth in Palestine to believe that COVID-19 was the reason that there was an insufficient number of jobs available (35% compared to 5%). Youth in Palestine were 84% more likely than youth in Jordan to believe that they had not found a job due to a general lack of op-

Unemployed youth in Jordan were seven times as likely as unemployed youth in Palestine to feel that COVID-19 was the reason that there was an insufficient number of jobs available

portunities in the market, without reference to COVID-19 (Figure 32). This difference is likely a reflection of the higher rates of unemployment that existed in Palestine compared to Jordan prior to the pandemic.ⁱⁱⁱ

iii ILO estimates for unemployment of the total population in 2019 were 25.3% for Palestine compared to 16.8% for Jordan. Source: World Bank Databank.

Figure 31: Youth in Jordan and Palestine who were looking for jobs a year and a half into the pandemic were most likely to be using internet job applications and personal contacts as their primary job search methods



Source: Youth Survey. N=438 (Jordan: 215; Palestine: 223). Youth were able to select up to two methods.



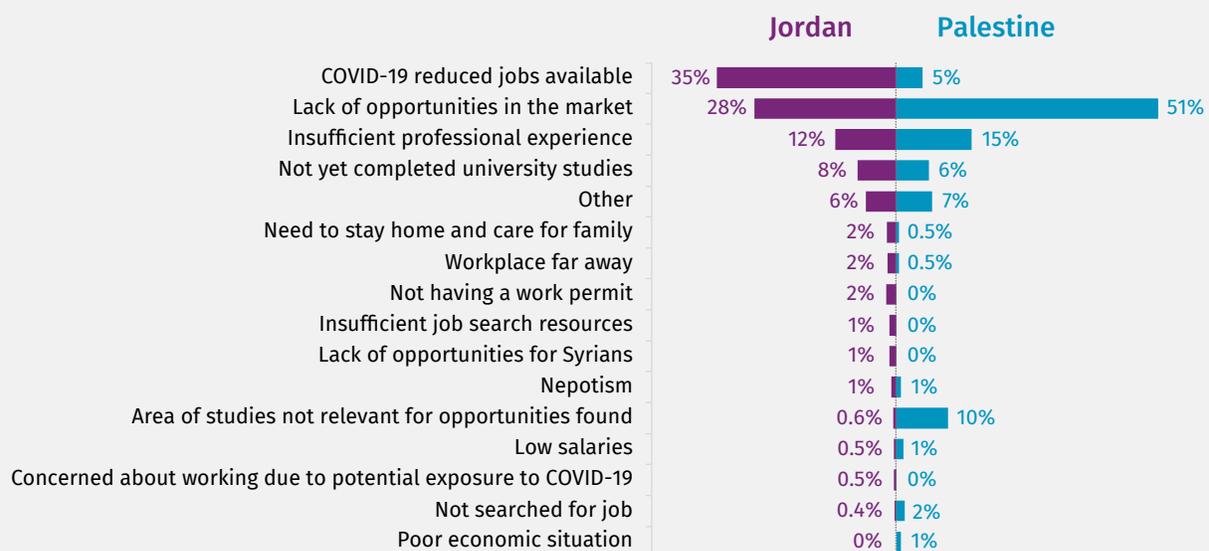
This trend was also observed at subnational levels. In Jordan, Jordanian nationals were more than twice as likely as refugees to indicate that the primary obstacle they faced in finding a job was that COVID-19 had reduced the number of jobs available (41% compared to 17%). This difference likely reflects the fact that prior to the pandemic, refugees in Jordan already faced a shortage of available opportunities due to restrictions in the industries in which they were permitted to work. This would have likely lessened the extent to which they felt that the shortage was due to the pandemic. This supposition is supported by the fact that 12% of refugee respondents cited obstacles to employment that relate specifically to job opportunities for refugees in Jordan: 6% of refugee youth cited a lack of opportunities for Syrians as the primary obstacle, and an additional

6% cited not having a work permit as the primary obstacle they faced.

Within Palestine, youth in Gaza were more than twice as likely as youth in the West Bank to cite a general lack of job opportunities in the market as the key obstacle to finding a job (53% in Gaza compared to 25% in the West Bank). Only 5% of youth in Gaza, compared to 13% of youth in the West Bank, indicated that the primary obstacle was that COVID-19 had reduced the number of jobs available. As referenced above, youth in Palestine were already facing a significant shortage of job opportunities prior to the pandemic, and this was particularly true for youth in Gaza.

As such, although vulnerable youth were most affected by the economic impacts of COVID-19, the

Figure 32: A year and a half into the pandemic, unemployed youth felt that an insufficient availability of jobs was the primary obstacle that had prevented them from finding a job, but youth in Jordan were more likely to cite COVID-19 as the driver of the job shortage



Source: Youth Survey. N=438 (Jordan: 215; Palestine: 223).



existing job shortages they faced prior to the crisis appear to have decreased the extent to which they felt that COVID-19 was the main driver of the current job shortage.

In addition to this finding, differences were found in the obstacles that young women and men cited as having prevented them from finding a job. In Jordan, young women were more likely than young men to indicate that the primary obstacle they faced to finding employment was that they needed to stay at home to take care of their family, though this was only mentioned by 2% of young women compared to 0% of young men. Young women were also more likely to indicate that the primary obstacle was that they had not yet completed their university studies (9% of young women compared to 0% of young men) and that they did not have sufficient professional experience (13% of young women compared to 3% of young men).

In Palestine, young women were more likely than their male peers to feel that their area of study was not relevant to the job opportunities they found (12% of young women compared to 2% of young men).

Economic Inactivity

Among surveyed youth, 15% in Jordan and 9% in Palestine were economically inactive, meaning that they were not currently employed or looking for work. Young women were more likely than young men to be economically inactive. In Jordan, 17% of young women were inactive compared to 6% of young men and in Palestine, 10% of young women were inactive compared to 5% of young men.

The analysis of the reasons why this subset of youth were not looking for work was restricted to the responses of young women due to the limited

number of young men in Jordan and Palestine who indicated that they were economically inactive (five in each case) as well as the variation that often exists between the reasons for economic inactivity between men and women in Jordan and Palestine. An analysis of variation in the responses of Jordanians compared to refugees living in Jordan and in the responses of youth in the West Bank compared to Gaza was not completed due to sample size limitations.

Among economically inactive young women in Jordan, 47% cited family responsibilities as the reason why they were not looking for work, indicating that it forms a key driver of women's economic inactivity. The next most commonly cited reasons were that they were currently focused on studying (18%), they did not find suitable opportunities (10%), and that they would begin studying again soon (10%).

The most commonly mentioned reason that young women in Palestine provided for not looking for a job was that they were currently focused on studying, cited by 62%. Young women in Palestine were more than three times as likely as young women in Jordan to cite this reason. A local expert consulted for this report noted that in response to the shortage of job opportunities in the market, many youth in Palestine choose to continue their pursuit of higher education in an effort to invest in themselves over the long term.

In addition, relatively smaller shares of economically inactive young women in Palestine explained that they were not looking for work because they did not find suitable opportunities (10%) and that they were not interested in working (10%). Only 7% of surveyed young women in Palestine cited family responsibilities as the reason why they were not looking, significantly less than the share of young women in Jordan who cited this reason (Figure 33).



Impact of COVID-19 on Youth Communities

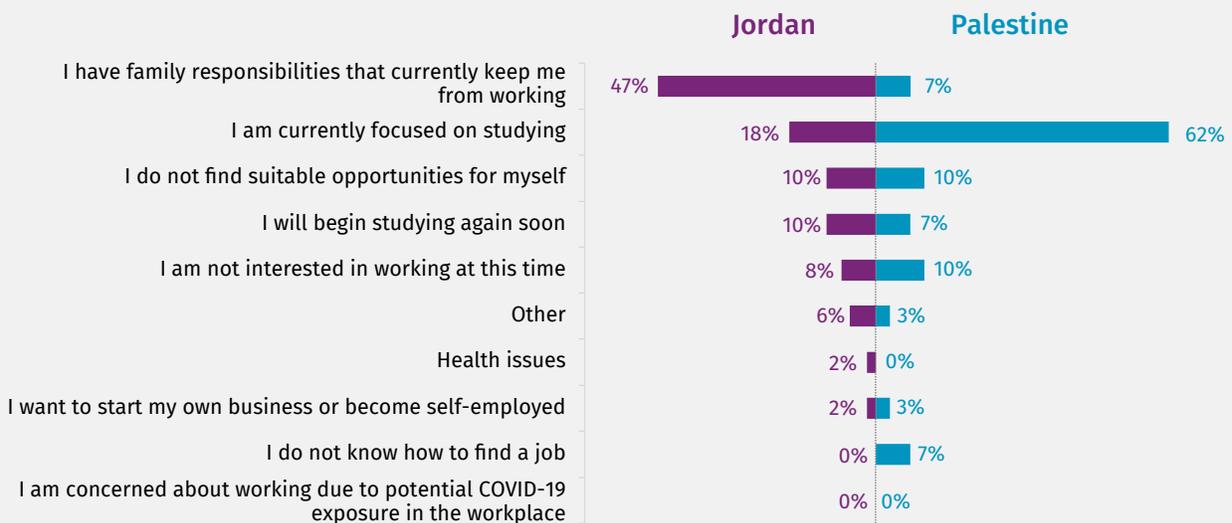
The youth survey revealed the extent to which COVID-19 impacted economic opportunities not only for youth, but also for their communities. More than half of youth surveyed in Jordan and more than a third of youth surveyed in Palestine had friends or family members who lost employment as a result of COVID-19 (54% compared to 38%, respectively).

Among refugee youth in Jordan, 70% indicated that they had friends or family who lost employment, compared to 50% of Jordanian youth. Refugee youth were also more than four times as likely as Jordanian youth to indicate that multiple friends or family members had lost employment (Figure 34). There were no notable differences between responses in the West Bank and Gaza.

The difference in the share of surveyed youth in Jordan and Palestine who had friends or family members who lost employment is likely a reflection of the higher rates of unemployment that existed in Palestine prior to the pandemic and the significant impact that COVID-19 had on employment opportunities for refugees in Jordan. The higher pre-pandemic unemployment rate in Palestine would likely have meant that a larger proportion of young people’s friends and family were already unemployed prior to the pandemic, and therefore, a smaller proportion of them would have lost jobs following the outbreak of COVID-19.

The observed difference between the survey results in Jordan and Palestine may also be due to the differing socioeconomic backgrounds of the youth surveyed in Palestine compared to Jordan. As mentioned previously, youth in the Palestine sample had a higher average education level than

Figure 33: A year and a half into the pandemic, young women in Jordan were most likely to be economically inactive due to family responsibilities, whereas young women in Palestine were most likely to be inactive because they were currently studying



Source: Youth Survey. N=80 (Jordan: 51; Palestine: 29). Analysis was completed on the responses of young women exclusively, as there were only five young men surveyed in each Jordan and Palestine who indicated that they were economically inactive. Youth were able to select up to two reasons for why they were not looking for work.



those in the Jordan sample. If the employed family members of the youth respondents in Palestine had a similar level of education, it may mean that they were working in jobs that were amenable to telework and could therefore have been maintained during the COVID-19 lockdowns.

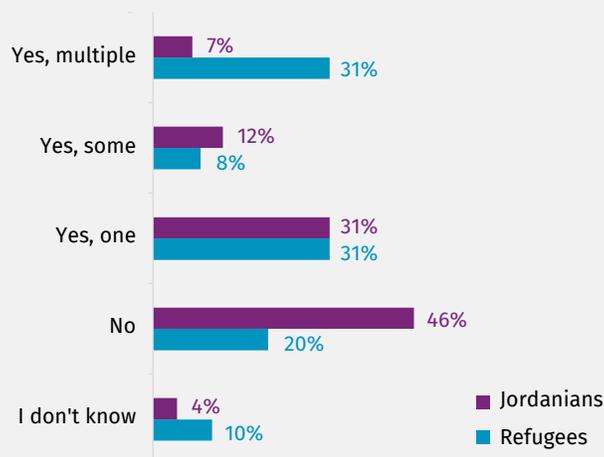
In addition, the variation could be a result of the differing age distributions of youth in the Jordan and Palestine samples. In Palestine, 70% of surveyed youth were 25 years old or younger compared to just 46% of respondents in Jordan. This likely means that the peers of many of the surveyed youth in Palestine were engaged in university studies rather than employment, and therefore would not have lost employment as a result of COVID-19.

Young men were more likely than young women to have had friends or family members who lost em-

ployment as a result of COVID-19. In Jordan, 66% of young men compared to 52% of young women indicated that friends or family had lost employment. In Palestine, 49% of young men compared to 34% of young women indicated that they had friends or family who had lost employment.

Social norms in Jordan and Palestine make it possible that many of respondents' friends are of their same gender. This norm, combined with the lower labor force participation rates among young women and the higher concentration of men in some of the sectors hardest hit by the COVID-19 crisis, such as construction and hospitality, may explain why young men would be more likely than young women to have friends who lost employment due to COVID-19. It is unlikely that the difference observed would be driven by significant variations in employment trends between the families of young women and young men.

Figure 34: Refugee youth in Jordan were 40% more likely than Jordanian youth to have friends or family members who lost employment as a result of COVID-19



Source: Youth Survey. N=381 (Jordanians: 285; Refugees: 96).

Obstacles to Finding a Job – Youth Communities

In Jordan, 75% of youth had friends or family members who faced obstacles in finding employment following the start of the pandemic, compared to 52% in the West Bank and 66% in Gaza (Figure 35).

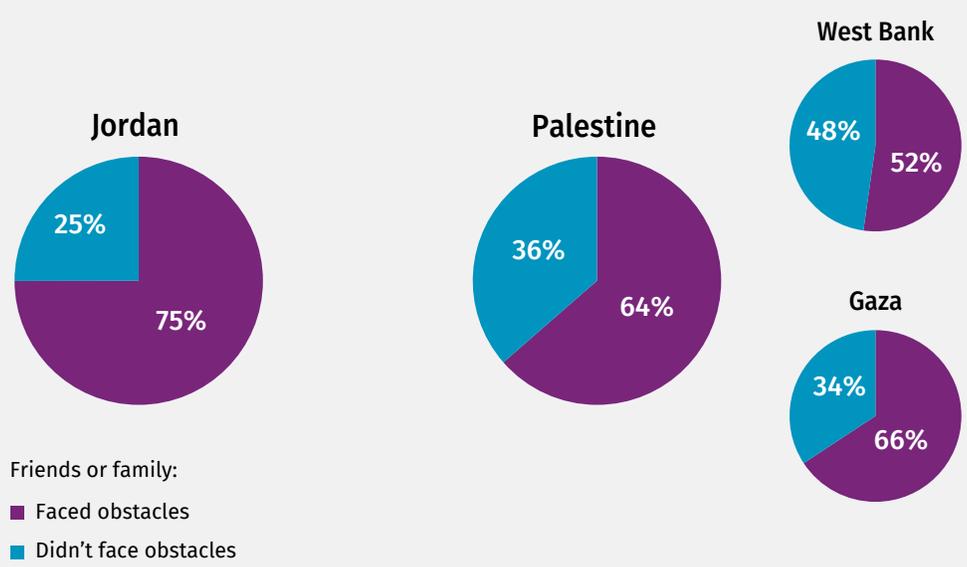
Jordanian and refugee youth were equally likely to state that friends or family members had faced obstacles. There were no statistically significant differences in responses between young men and women in Jordan or Palestine.

The large share of youth in Gaza who indicated that friends or family had faced obstacles is in

line with the observations of experts and key stakeholders. They noted that Gaza experienced economic shocks of a larger magnitude than those in the West Bank, both prior to and since the onset of the pandemic. However, the relatively higher share of youth in Jordan compared to Palestine who indicated that their friends or family members experienced obstacles to finding employment is notable. This difference may be a reflection of the differing socioeconomic and age characteristics of the respondents in Jordan compared to Palestine, as explained above.

Youth who indicated that their friends and family had faced obstacles to finding employment since the start of the COVID-19 crisis were asked to specify the principal obstacle that they faced.

Figure 35: Most surveyed youth have friends or family members who faced obstacles in finding employment following the start of the pandemic, but challenges were most acute in Jordan and Gaza



Source: Youth Survey. N=774. (Jordan: 381; Palestine: 393 – Gaza: 311, West Bank: 82).



Youth in both Jordan and Palestine were most likely to cite challenges related to a shortage of available jobs. However, youth in Jordan were significantly more likely than youth in Palestine to name COVID-19 as the culprit for the reduction in available jobs, whereas youth in Palestine were significantly more likely than youth in Jordan to cite a lack of job opportunities in the market generally (Figure 36).

This varying perspective between the reason why friends and family have faced obstacles to finding employment mirrors the explanations that unemployed youth provided for why they themselves had been unable to find jobs. As mentioned above, this may indicate that youth in Jordan felt that the pandemic had a relatively larger impact on employment availability than youth in Palestine given the lower unemployment rates in Jordan prior to the pandemic, as well as the significant impact that the pandemic had on employment opportunities for refugees. There were no statistically significant differences between responses from the West Bank and Gaza.

In Jordan, both Jordanian and refugee youth were most likely to feel that the impact of COVID-19 on job availability was the principal obstacle that their friends and family faced in securing employ-

ment. However, Jordanian youth were 33% more likely than refugee youth to cite this reason. In addition, refugee youth were more than twice as likely as Jordanian youth to cite a general lack of opportunities in the market as the principal obstacle (Figure 37).

This difference in perspective likely reflects the varying levels of access that Jordanians and refugees had to employment opportunities prior to the pandemic. Although overall unemployment rates in Jordan were relatively high prior to the crisis, refugees faced additional challenges in securing employment beyond those of their Jordanian peers. Syrian refugees face legal restrictions on the sectors and job types in which they are legally permitted to work, and refugees from other countries are not permitted to secure work permits and remain registered with UNHCR.¹³¹

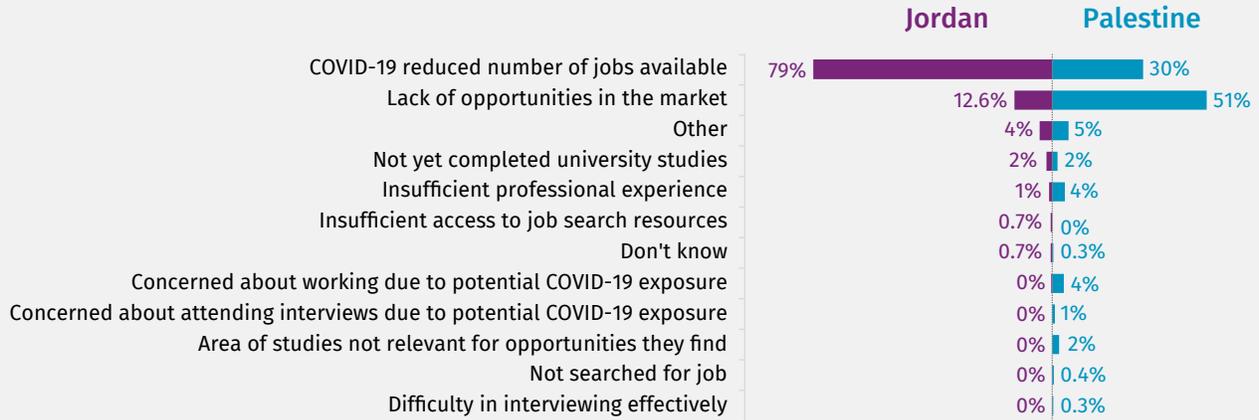
In Jordan, the only notable statistical difference between young men and women was that young men were twice as likely as young women to cite a lack of opportunities in the market as the main obstacle that their friends and family had faced to securing employment (23% compared to 11%, respectively). In Palestine, there was no statistically significant difference in responses between young women and men.

It is notable how few respondents cited COVID-19 health-related concerns as the principal obstacle that had prevented their friends and family from securing employment. This suggests that economic needs have been of relatively higher concern than the potential health impacts of the pandemic within the communities of surveyed youth. This is not necessarily reflective of community attitudes surrounding the seriousness of the health threat posed by the pandemic. Rather, it is likely a reflection of the pressing challenges that many households have been facing in meeting their basic needs.

More than half of youth surveyed in Jordan and more than a third of youth surveyed in Palestine had friends or family members who lost employment as a result of COVID-19.

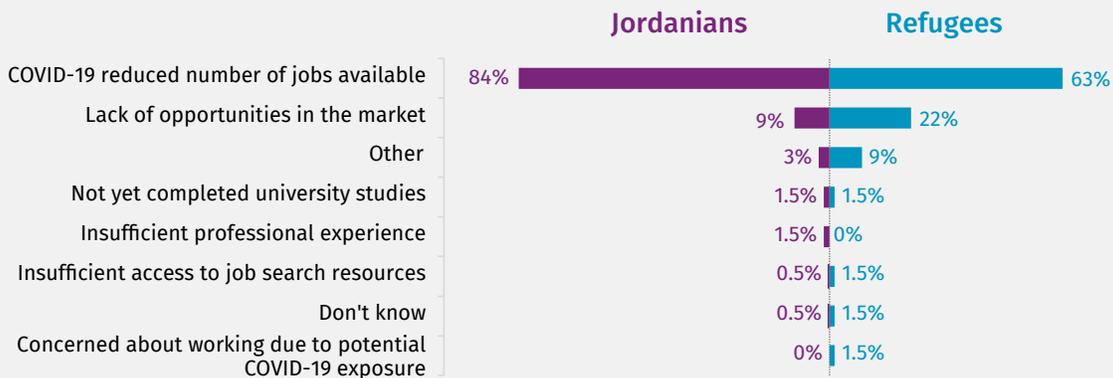


Figure 36: Youth in Jordan were more than twice as likely as youth in Palestine to believe that a reduction in the number of jobs available due to COVID-19 was the main obstacle that their friends and family faced in finding employment



Source: Youth Survey. N=537 (Jordan: 289; Palestine: 248).

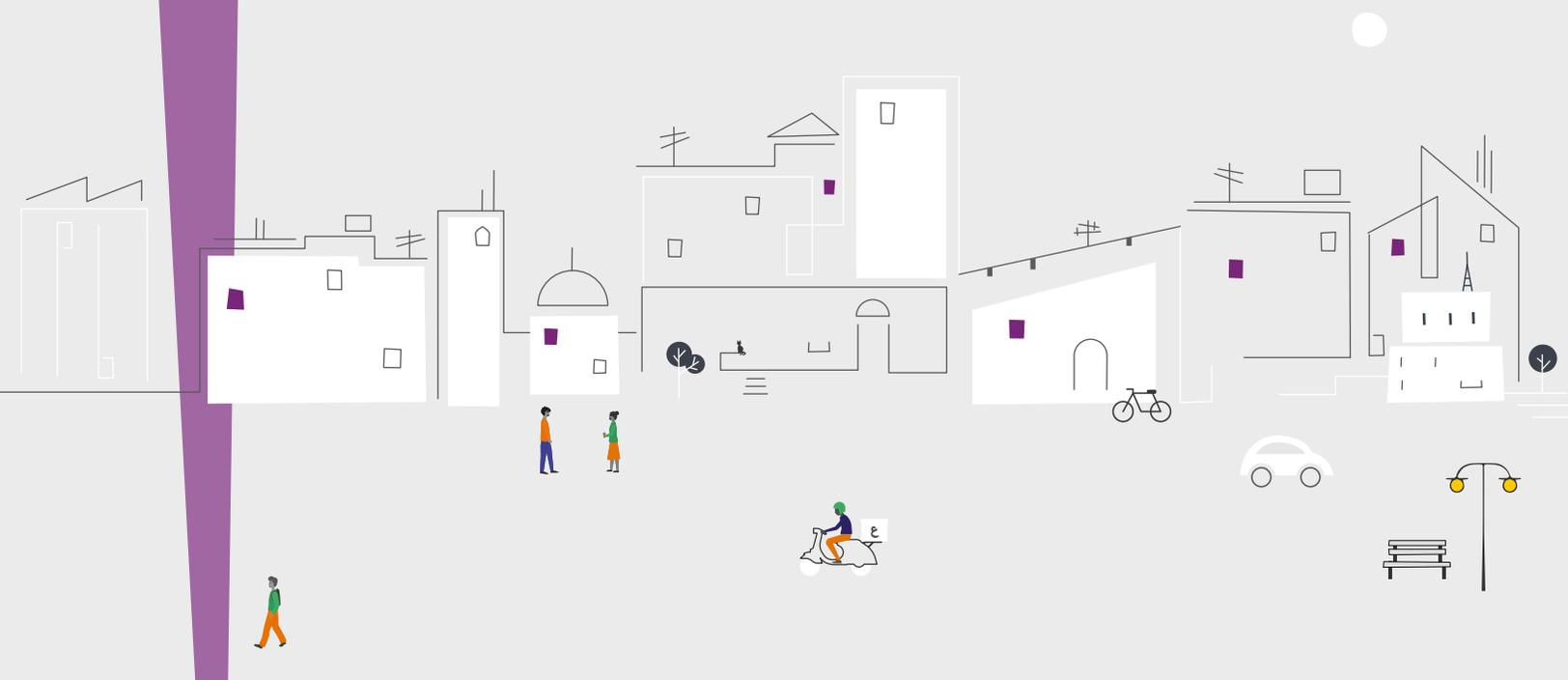
Figure 37: Both Jordanian and refugee youth felt that the impact of COVID-19 on job availability was the principal obstacle to employment for their friends and family, but refugees were more than twice as likely as Jordanians to cite a general lack of opportunities as the main obstacle



Source: Youth Survey. N=289 (Jordanians: 214; Refugees: 72).



Looking Forward: Promising Programming, Skills, and Sectors for Youth





As detailed in the previous sections, the COVID-19 pandemic has exacerbated the already significant challenges that youth and other vulnerable populations in Jordan and Palestine face in joining and remaining in the workforce. The purpose of the following sections is to lay the groundwork for identifying promising approaches to support youth during the COVID-19 recovery in light of the significant impacts that the pandemic has had on their workforce participation and economic wellbeing.

The sections below explore youth demand for workforce development programming, the skills youth will need for success in the labor market during the COVID-19 economic recovery, as well as promising sectors for youth employment in Jordan and Palestine over the coming two years.

Youth Demand for Workforce Development Programming

As part of the youth survey conducted under this study, youth were asked what services they thought were most important for workforce development implementers to provide for young people who are currently looking for jobs in their city. Respondents were prompted to select as many services as they wished.

In Jordan, youth were most likely to indicate that technical skills training, assistance to locate job opportunities, and soft skills training were the most important services. Youth in Palestine had similar priorities and were most likely to mention technical skills training, followed by soft skills training and assistance to connect with employers (Figure 38).

Although answers pertaining to labor market connections made it into the top three responses for both Jordan and Palestine, youth in Jordan were more likely to indicate that assistance to locate job opportunities was most important (64% com-

Young women in Jordan were significantly more likely than their male peers to indicate that technical skills training was an important service for young people

pared to 26% in Palestine) and youth in Palestine were more likely to indicate that connections with employers were most important (40% compared to 22% in Jordan).

Youth in Palestine were also significantly more likely than youth in Jordan to indicate that incubator services for start-ups (26% compared to only 1%), connections to other young job seekers (18% compared to 5%), and the option to participate in a job fair (6% compared to 1%) were important.

The significantly higher proportion of surveyed youth in Palestine who indicated that incubator services for start-ups were important is notable considering that only a small proportion of the overall population of program graduates from which the Palestine sample was selected completed entrepreneurship training (7%). The proportion of entrepreneurship program graduates within the overall population from which the sample was drawn in Jordan was just over double the share in Palestine, reaching 19%. The large share of youth in Palestine who stated that incubator services are important may indicate that many youth in Palestine feel the need to pursue entrepreneurship opportunities as a method for overcoming job scarcity.

In Jordan, both young women and men felt that assistance in locating job opportunities was a top



priority, with 65% of women and 63% of men mentioning it. However, young women in Jordan were significantly more likely than their male peers to indicate that technical skills training was an important service for young people (71% vs. 53%, respectively) and were more than three times as likely as young men to indicate that assistance to connect with employers was important (25% vs. 8%, respectively). Women were also more likely than men to indicate that connections to other job seekers were important, though this was not a widely held priority, with only 6% of women citing it compared to only 1% of men.

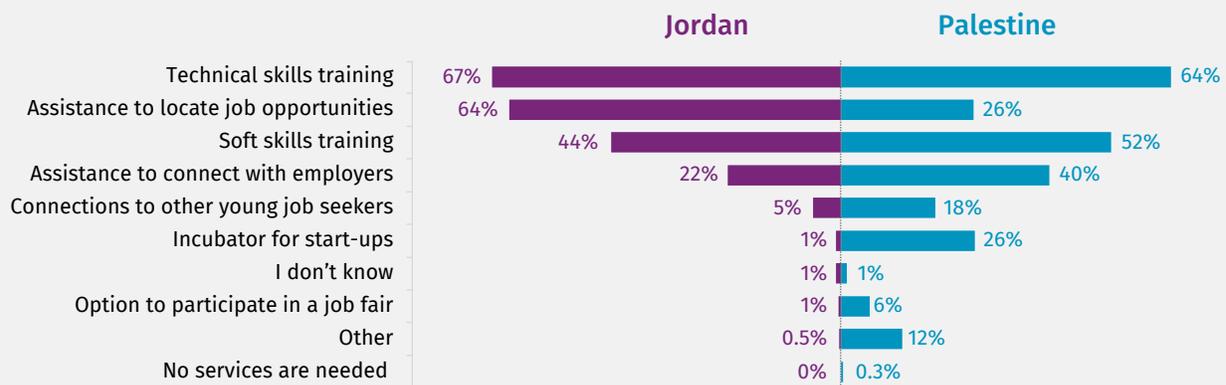
These findings suggest that young women in Jordan may benefit from an increased focus on technical training involving apprenticeship models. The tendency of female university students in Jordan to pursue studies in the humanities, and the shortage of job opportunities available that

relate to these fields, likely contribute to this increased demand for technical training among young women.¹

Jordanian youth were 66% more likely than refugee youth to indicate that technical skills training was an important service, with 75% of Jordanians compared to 45% of refugees indicating as such. Jordanians were also 49% more likely than refugees to state that soft skills training was important, with 48% of Jordanians mentioning it compared to 32% of refugees. For their part, refugee youth in Jordan were most likely to feel that assistance to locate job opportunities was an important service, cited by 72%.

In Palestine, only one statistically significant difference was found between men and women and between youth in the West Bank and Gaza, and it pertained to respondents' level of interest in be-

Figure 38: Surveyed youth in Jordan and Palestine felt that technical and soft skills training, as well as assistance in getting connected to jobs and employers, were the most important services that workforce development organizations should provide for young people who are currently looking for work in their cities



Source: Youth Survey. N=774 (Jordan: 381; Palestine: 393). Youth were prompted to select as many services as they wished.



ing connected to other young job seekers. Among young women, 21% cited this as a service that was important compared to 12% of young men, and respondents in the West Bank were twice as likely as respondents in Gaza to cite this as an important service (32% compared to 16%, respectively).

Demand for Skills

The youth and employer surveys aimed to understand youth expectations regarding the skills they would need to succeed in the labor market over the next two years, in addition to understanding employer demand for skills over the same period (Figure 39).

The top three skills that youth in Jordan thought young people would need to succeed in the labor market over the next two years were language skills, ICT/digital skills, and communication skills. In Palestine, youth were most likely to indicate that ICT/digital skills, communication skills, and technical/job-specific skills were the most important.

Youth in Palestine were nearly seven times as likely as those in Jordan to believe that knowing how to work remotely would be a critical skill for youth success in the labor market over the next two years. They were also 23% more likely than youth in Jordan to believe that ICT/digital skills were critical and were also more likely to feel that communication and technical job-specific skills were important. Youth in Jordan were twice as likely as those in Palestine to indicate that language skills were critical.

The greater emphasis that youth in Jordan placed on language skills compared to youth in Palestine may be due to the significant role that the tourism and hospitality sector has played in Jordan, in addition to its growing outsourcing sector. The emphasis on ICT/digital skills among youth

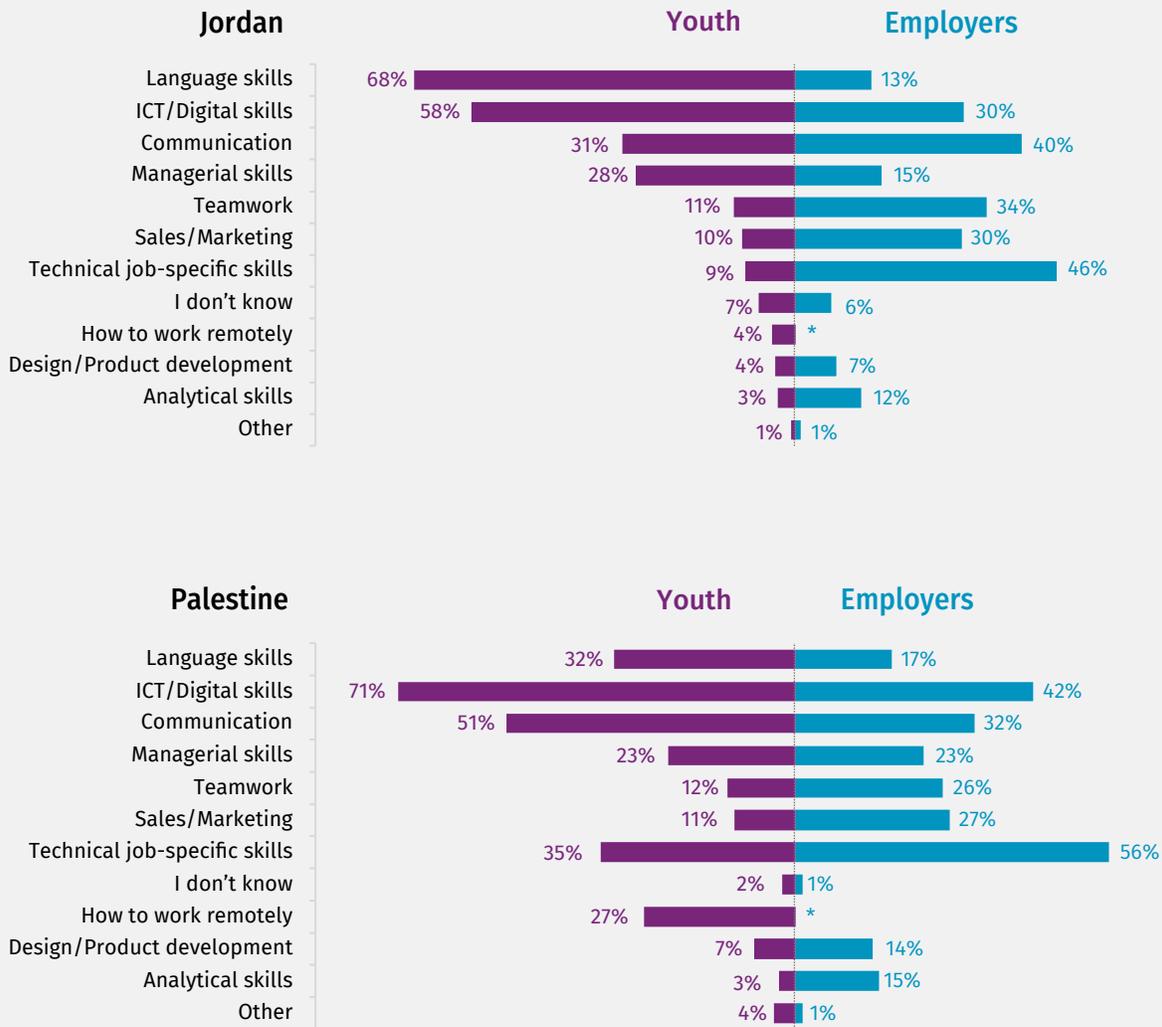
Youth in Palestine were nearly seven times as likely as those in Jordan to believe that knowing how to work remotely would be a critical skill for youth success in the labor market over the next two years

in both Jordan and Palestine is in line with what experts and key stakeholders noted during interviews regarding the growing focus on ICT-related sectors and skills in both countries. Furthermore, the relatively higher focus on ICT/digital, remote working, technical job-specific, and communication skills among youth in Palestine may be driven by a sense that the limited job growth within Palestine necessitates a look toward global markets through digital jobs.

In both Jordan and Palestine, youth and employer opinions regarding the most important skills needed over the coming two years varied significantly. Employers in Jordan believed that technical job-specific skills, communication skills, and teamwork skills were those that they would be most likely to seek in the coming two years. Employers in Palestine also stressed the importance of technical job-specific skills and communication skills, but they placed a greater emphasis than employers in Jordan on ICT/digital skills. Among surveyed employers in Palestine, 42% indicated that ICT/digital skills would be among the most important skills that the company would seek when looking for new employees over the next two years, compared to 30% of surveyed employers in Jordan.



Figure 39: Youth opinions about the most critical skills young people will need to succeed in the labor market over the next two years varied significantly from the skills that employers are most likely to seek when looking for new employees over the same period



Source: Youth and Employer Surveys. Jordan: Youth: N=381; Employers: N=112; Palestine: Youth: N=393; Employers: N=84.

Youth were asked to identify what they thought were the most critical skills that young people would need to succeed in the labor market over the next two years. Employers who indicated that their companies would be hiring over the next two years were asked to identify the most important skills that they thought the company would seek when looking for new employees over the next two years. Both youth and employers were asked to select up to three answers. *How to work remotely was an answer choice provided to youth respondents only.



Employer demand for technical job-specific skills, communication, and teamwork is in line with what EFE has found through previous market assessments and ongoing consultations with employers. EFE has found that although employers often stress the importance of technical skills as being central to hiring decisions, they also note that poor soft skills often form a key impetus for letting employees go. The recognition of employer survey respondents that communication and teamwork were top skills alongside technical job-specific skills appears to reinforce the complementarity of technical and soft skills for youth success in the workforce.

It is notable that more employers did not indicate that ICT/digital skills were among the most important skills that they would seek when looking for new employees over the next two years. Multiple experts and key stakeholders stressed the role that basic digital skills will play in the labor market due to the effects of COVID-19. Interviewees cited examples of increased technology use in new domains such as digital menus at restaurants, the use of e-wallets to pay for services completed while physically distanced, and online food orders.

Respondents to the employer survey may have considered ICT/digital skills to fall under the category of technical/job-specific skills, or they may feel that these skills are not the most critical for their particular companies. The divergence in youth and employer opinions may also indicate that youth opinions on needed skills focused to some extent on aspirational jobs, whereas employer responses were rooted in an understanding of their upcoming hiring needs, which may be less dependent on ICT/digital skills.

In addition to these findings, the employer survey revealed that despite the significant impact that the pandemic had on the labor market, the skills

that employers seek have varied little in many cases. In Jordan, 78% of surveyed employers indicated that they were looking for the same skills that they sought in employees prior to the pandemic, as did 70% of those in Palestine. However, 16% of surveyed employers in Jordan and 26% of those in Palestine believe that the most critical skills have changed (Figure 40).

Employers in Jordan who will be seeking employees with different skills now compared to the pre-pandemic period reported an increase in the need for ICT/digital skills, and skills in sales/marketing, communication, and design/product development. Employers in Palestine who will be seeking employees with different skills now compared to the pre-pandemic period reported an increase in the need for ICT/digital skills and skills in sales and marketing. However, it is important to note that the small size of this subgroup of respondents, totaling 18 in Jordan and 22 in Palestine, makes it difficult to reach widely relevant conclusions regarding potential shifts in the skill focus of employers.

Youth Opinions on Promising Sectors for Employment

Respondents to the youth survey were asked to identify the top two sectors that they thought would offer the most job opportunities for young people over the next two years. In Jordan, youth were most likely to mention the ICT sector, advertising/marketing/PR, and factory production. As in Jordan, youth in Palestine were most likely to feel that the ICT sector would be the most promising, followed by advertising/marketing/PR and medical/health services.

Only 3% of respondents in Jordan and 2% in Palestine stated that government/civil service was a promising sector. This suggests that although many young people still hold preferences for gov-



ernment jobs, their attitudes may have begun to shift in response to the reality of shrinking opportunities in the sector (Figure 41).

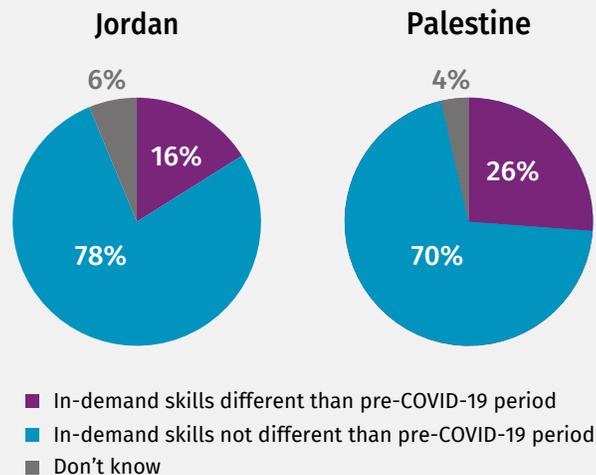
Two notable differences between the responses of young men and women in Jordan were the shares who felt that HVAC and power/utilities would be promising sectors. For HVAC, 16% of male respondents said it would be promising, compared to only 5% of females. For power/utilities, 10% of males felt the sector was promising, compared to only 1% of females. These differences reflect commonly held perceptions regarding sectors that are considered appropriate for men and women within the local context.

As for gender differences within Palestine, young

women were more likely than young men to state that education/academia (15% vs. 6%, respectively) and medical/health services (17% vs. 9%, respectively) were promising sectors. Young men were more likely than young women to feel that advertising/marketing/PR was a promising sector (69% vs. 57%, respectively).

There were also notable differences in opinions between Jordanian and refugee youth. Jordanians were twice as likely as refugees to indicate that ICT would offer the most job opportunities for youth in the coming two years. In addition, refugee youth were more likely than Jordanian youth to believe that HVAC, agriculture, and construction were promising sectors. It is likely that refugee youth expect there to be opportunities in

Figure 40: Most employers surveyed anticipated needing the same skills of employees in the coming years compared to the pre-pandemic period



Source: Employer Survey. N=196 (Jordan: 112; Palestine: 84).



the agriculture and construction sectors because they are legally permitted to work within them (Figure 42).

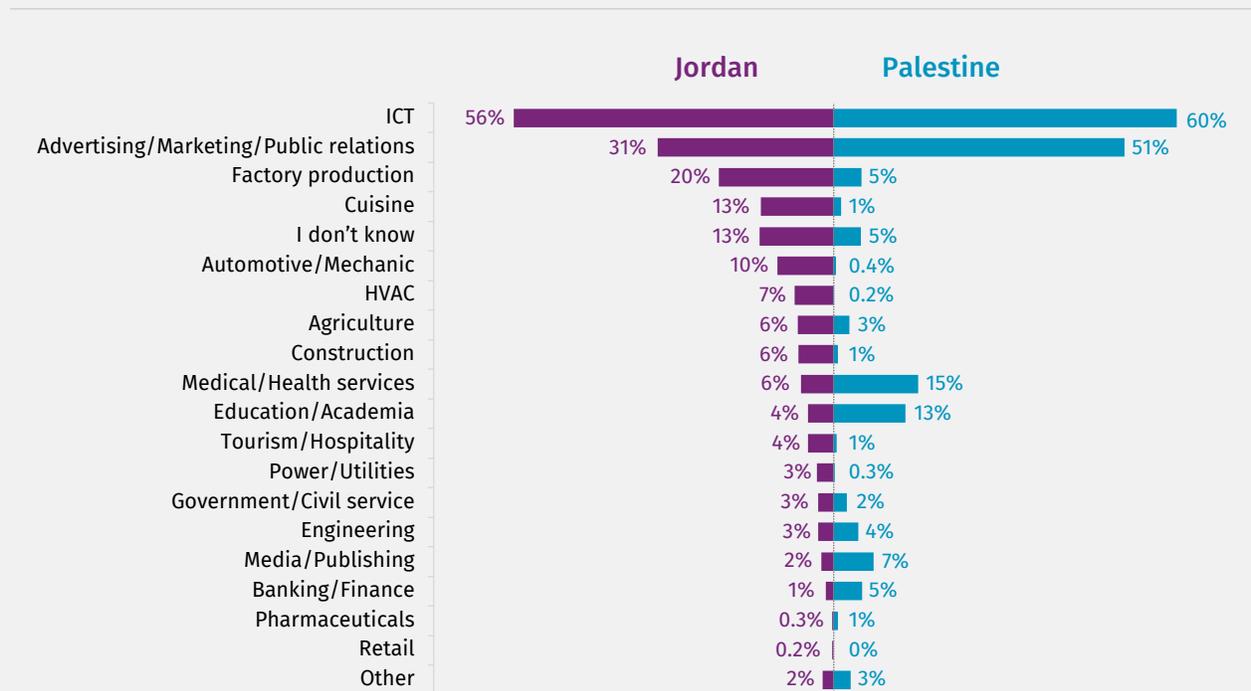
Youth living in the West Bank and Gaza shared the opinion that ICT and advertising/marketing/PR were the most promising sectors, though youth in Gaza were more likely to mention ICT than those in the West Bank. Youth in the West Bank were more likely than their peers in Gaza to indicate that medical/health services, banking/finance, and factory production were promising sectors. In addition to their more significant focus on ICT, youth in Gaza were more likely than their peers in the West Bank to state that advertising/marketing/PR and education/academia were promising sectors (Figure 43).

Assessment of Promising Sectors for Youth Employment

Based on the results of the subject matter expert and key stakeholder interviews, as well as the youth survey, 13 sectors were examined as possible avenues for youth employment during the COVID-19 recovery. These sectors included ICT and virtual jobs; agriculture; food processing; digital advertising and marketing; banking; construction; education and academia; healthcare; hospitality, tourism, and services; manufacturing; renewable energy; retail; and vocational fields.

An overview of each sector is included below, along with an assessment of its potential to prove promising for youth employment opportunities

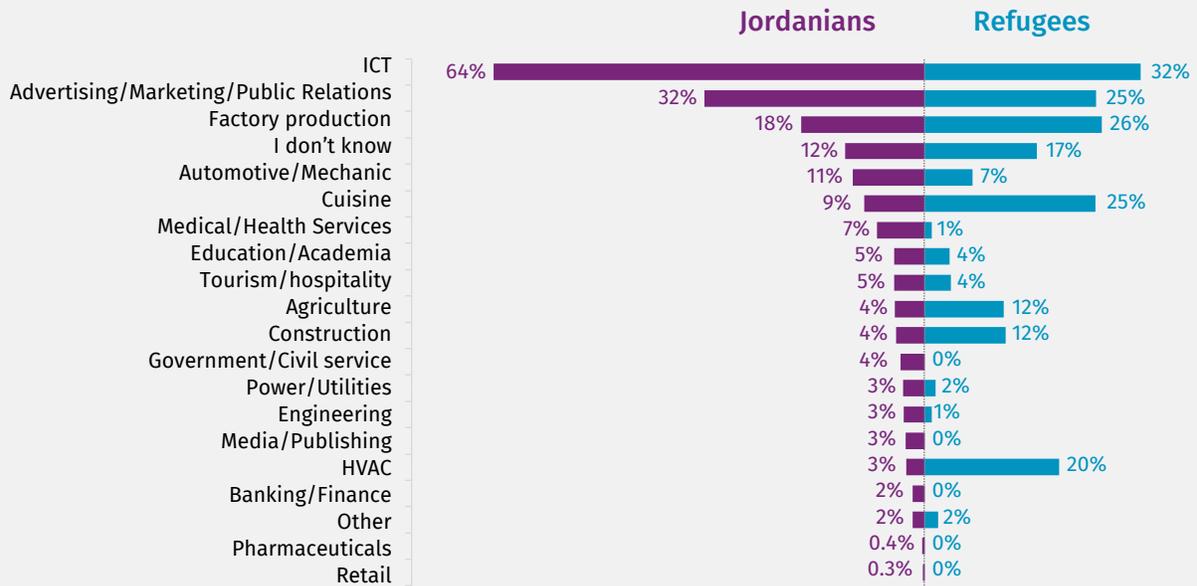
Figure 41: Youth in Jordan and Palestine agreed that ICT and advertising/marketing/PR would offer the most job opportunities for young people over the next two years, but their views diverged on the potential for employment in other sectors



Source: Youth Survey. N=774 (Jordan: 381; Palestine: 393). Youth were prompted to select up to two sectors.

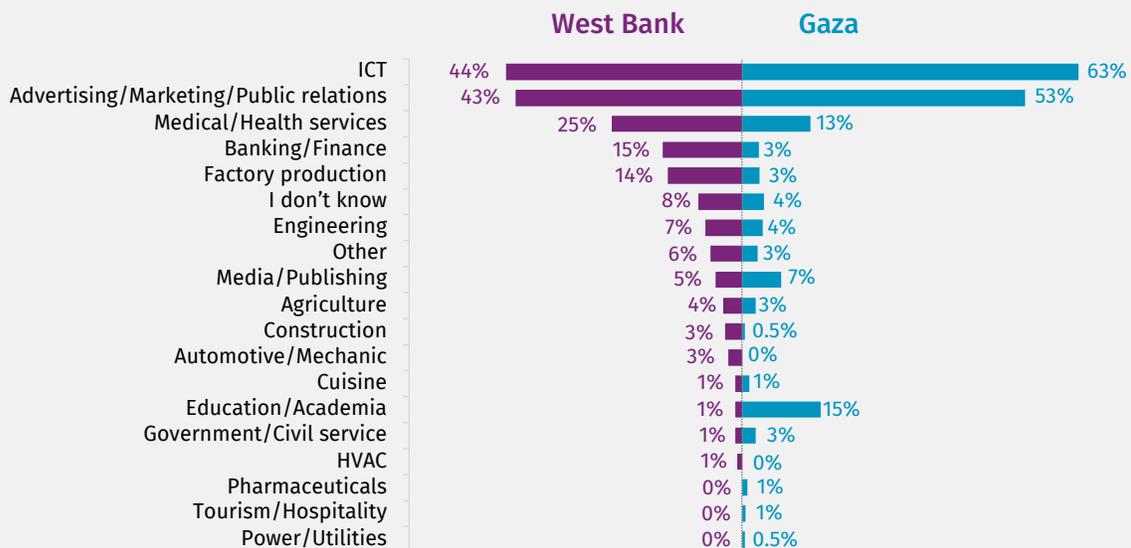


Figure 42: More than half of surveyed Jordanian youth believed that the ICT sector would offer the most job opportunities for young people over the next two years, whereas refugee youth saw opportunity in a variety of sectors, primarily those that are open to Syrians



Source: Youth Survey. Jordanians: 285; Refugees: 96. Youth were prompted to select up to two sectors.

Figure 43: Youth in the West Bank and Gaza indicated that ICT and advertising/marketing/PR were promising sectors, but they diverged in their opinions on the promise of job opportunities in factory production, medical/health services, education/academia, and banking/finance



Source: Youth Survey. N=393 (West Bank: 82; Gaza: 311). Youth were prompted to select up to two sectors.



during the COVID-19 recovery. The discussion considers whether some sectors may be more promising for youth in Jordan or Palestine, and also more specifically, within the West Bank or Gaza. It also considers whether individual sectors may be more or less promising for refugees or Jordanians within the context of Jordan. Lastly, the discussion also considers the potential of various sectors to be promising for boosting the labor force participation of young women.

ICT Sector and Virtual Jobs

As noted in the previous section, youth were highly optimistic overall about the potential of the ICT sector to offer employment opportunities for young people over the next two years. In addition, 17% of Jordanian youth who were working in wage employment or internships a year and a half into the pandemic were employed in this sector, as were 11% of those in the West Bank and 9% in Gaza.

Subject matter experts and key stakeholders consulted for this report also believed that the ICT sector was very promising. A significant share of interviewees agreed that the ICT sector and jobs related to digital transformation in other sectors fared best throughout the pandemic and were likely to continue to grow in the near future. Interviewees further explained that the most resilient businesses throughout the pandemic were those that relied on online work and e-commerce and that workers who had basic digital literacy skills and the ability to work online also fared the best. They also noted the potential for the ICT-enabled business process outsourcing (BPO) sector to create jobs in Jordan and Palestine.

In addition to expressing optimism about the continued growth of the ICT sector in Jordan and Palestine, interviewees noted that demand for employees with digital and IT skills would not be

Subject matter experts and key stakeholders noted that demand for employees with digital and IT skills would not be limited only to businesses in the ICT sector, but would also extend to companies in other sectors that are looking to digitize their operations and products

limited only to businesses in the ICT sector, but would also extend to companies in other sectors that are looking to digitize their operations and products. For example, an industry representative in Jordan interviewed for this report noted the importance of restaurant staff having sufficient digital skills to allow them to manage technologies such as online ordering and the use of QR codes to connect to online menus, which have expanded as a result of the pandemic. As such, although a focus on more advanced ICT skills could provide opportunities for some youth, the development of basic digital literacy will likely be critical for the success of young people across a wide range of industries.

In terms of skill requirements, interviewees believed that both basic digital literacy as well as more advanced digital skills in areas such as artificial intelligence, data science, cybersecurity, digital marketing, and e-commerce would be in strong demand in Jordan and Palestine in the coming years. However, meeting these skill requirements might be a challenge for educational



institutions in both countries, as local stakeholders noted that there is still a significant gap between the skills that graduates from ICT university programs possess and the needs of private sector companies, including multinational companies. In Palestine, the technical skills gap has prevented many of the 3,000 graduates from university IT programs from securing employment in the sector,² and in Jordan, less than 40% of the approximately 5,000 annual university ICT graduates secure employment in the sector.³

Key stakeholders and subject matter experts noted that some large technology companies have begun offering certificate courses online, which can be complementary to university education to help in the school-to-work transition. They also recommended that universities incorporate on-the-job training and apprenticeship programs to help ICT graduates secure employment.

One key stakeholder in Jordan noted that English language skills could sometimes be a barrier for individuals looking to access the ICT sector, particularly those from more vulnerable backgrounds. However, they noted that there are some ICT-related fields, such as mobile maintenance, that require less English proficiency and may therefore be more accessible for vulnerable youth. This barrier has been noted elsewhere in regard to both Jordan⁴ and Palestine, and some implementers have focused their programming on helping young freelancers overcome this hurdle.⁵

Jordan is currently in the process of positioning itself as an ICT hub for the MENA region, and Palestine is working with the World Bank to enable an expansion of the digital economy through improved telecommunications infrastructure. These developments lend support to the optimism that interviewees expressed.

The ICT Sector in Jordan

The GoJ is making a concerted effort to develop the technology sector as a key area for economic growth and job opportunities, building on the momentum garnered by large multinational technology companies such as Microsoft and Amazon establishing a presence in the country.⁶ ICT service exports made up 0.36% of the total service exports from Jordan as of 2017,⁷ and this figure is likely to rise. Revenues increased between 2018 and 2020, reaching \$110 million in 2020 compared to just \$55 million in 2018.⁸ During the pandemic alone, the ICT sector in Jordan has grown by 6%,⁹ indicating its resilience during a period in which most sectors were struggling. Furthermore, the sector employed an estimated 8,000 individuals in Jordan over the past three years and is projected to generate an additional 10,000 opportunities in the coming two years.¹⁰

Although the sector has garnered increasing attention over the past decade, the GoJ has been taking steps to build a strong technology sector since 2000 when it launched the REACH Initiative, focused on ICT development. Building on this foundation, the follow-on REACH 2025 Initiative was launched in 2016 under the auspices of the Ministry of Information and Communications Technology (MoICT). The Initiative aims to enable digitalization of the Jordanian economy more broadly, focusing on the health, education, energy and clean technology, transport, financial,

**During the pandemic alone,
the ICT sector in Jordan has
grown by 6%**



communications, and security sectors. At the time that the Initiative was launched, it was estimated that concerted and consistent efforts to develop the digital economy through 2025 could result in the creation of between 130,000 and 150,000 jobs and between 5,000 to 7,000 new businesses. In addition, the annual increase in GDP resulting from the Initiative was projected to reach 4% by 2025.¹¹ The economic impacts of the pandemic may extend the timeline required for these jobs to be generated, however.

The Ministry of Digital Economy and Entrepreneurship (MoDEE), founded in 2019,¹² has a broad mandate to support the development of a strong digital economy in Jordan through the expansion of entrepreneurial opportunities and investment in the sector, improved digital skills among Jordanians, increased access to markets and funding for entrepreneurs, improved regulatory frameworks, expanded digital infrastructure including broadband internet and digital financial services (DFS), and digitization of government services.¹³ Key factors that MoDEE has identified as competitive advantages for Jordan in the digital services space include quality infrastructure, sales tax and import customs exemptions, proximity to the GCC market, bilingual university graduates, and political stability.¹⁴

In addition to these supportive factors and positive developments for the sector, the GoJ is engaged with the World Bank on the wide-ranging Youth, Technology and Jobs Project, which will further advance these objectives. With a commitment amount totaling \$163.1 million, the project will focus heavily on developing digital skills for both Jordanians and Syrian youth through direct training and training of trainer initiatives, including at public schools. It will also aim to support increased access to digital opportunities within underserved areas by supporting technology centers, or “Tech Hubs,” at Vocational Training Insti-

tutes (VTIs) and through the provision of incentives aimed at driving growth in the digital sector in these areas.¹⁵ A key component of the project pertains to improving the ability of the educational system to respond quickly to the needs of the ever-changing digital sector. The project also seeks to expand access to the gig economy through trainings delivered by community organizations with a focus on sectors responsive to Syrian refugees and women.¹⁶

The Tech Hubs will serve as co-working and networking spaces for local IT businesses, entrepreneurs, gig workers, and community organizations, and will also serve as training spaces.¹⁷ The project will also advance labor market-focused skill development by supporting the formation of the National Skills Council for Information and Communications Technology (NSC-ICT), which will have significant private sector representation in its leadership. In addition, the project will support the digitization of government services as a way to enable private sector development.¹⁸ MoDEE will implement the project in partnership with the Ministry of Education (MOE) and Ministry of Labor (MOL).¹⁹

In addition to these wide-reaching initiatives, the Jordan 2025 Vision and Strategy highlights the country’s potential to develop as a digital exporter and BPO hub due to its quality infrastruc-

40% of ICT companies in Palestine are involved in export activities and 50% have partnerships outside of Palestine



ture, location, and skilled labor force that has the ability to work in both Arabic and English. The 2025 Vision and Strategy notes the sector's potential to offer opportunities for skilled women in particular.²⁰ As mentioned above, there is a need to close the ICT skills gap, and, for some youth, support their development of advanced English language skills, in order for Jordan to seize the full opportunity offered by its growing ICT sector.

The ICT Sector in Palestine

ICT is a growing sector in Palestine and constitutes a promising avenue for employment.²¹ The sector accounted for 4% of GDP in 2019, and as of 2020, there were 250 ICT companies in Palestine employing approximately 5,000 people. The sector also represents an important source of connections to international markets, with 40% of ICT companies involved in export activities and approximately 50% having partnerships outside of Palestine.²² In addition, the contribution of ICT to overall service exports has been rising over the past decade, and as of 2020, ICT made up 15.6% of the overall service exports of Palestine.²³ Furthermore, the continued growth of ICT in Palestine can play a key role in supporting broader economic development.²⁴ This potential for positive spillover effects makes developing the sector a strategic choice, in addition to one that has the potential to generate jobs for young people.

The ICT sector in Palestine benefits from a general trend of increasing local demand and a high level of diversification, with companies operating in software development, telecommunications, computer hardware imports, and many other areas.²⁵ The sector also benefits from being a priority area for the PA. The Ministry of Telecom & Information Technology (MTiT) has outlined a number of goals within its ICT sector strategy. Among them are to establish a strong reputation for the Palestinian ICT sector to stimulate demand at local, regional,

As of 2020, ICT made up 15.6% of the overall service exports of Palestine

and global levels, instilling digital competencies in youth from a young age, improving online government services and the ICT regulatory environment, improving technical infrastructure, and expanding telecommunication services.²⁶

MTiT has identified a number of strengths that Palestine possesses that will be supportive in developing the ICT sector. These strengths include its young population, the spread of ICT higher education in Palestine, the population's high overall level of education, government interest in developing a knowledge society, the presence of local investors focused on the sector, and others.²⁷

The Palestinian ICT sector was among the least affected by COVID-19, yet it faced challenges adapting to new market realities nonetheless. A local industry representative interviewed for this study noted that companies working in multiple areas of operation including hardware, software, consultancy/training, and communication/internet service provision experienced various issues related to fluctuations in market demand and supply chain interruptions following the start of the pandemic. For example, ICT hardware companies in Gaza faced a shortage of goods as a result of pandemic-related border closures as well as limited market demand due to the economic situation. The representative noted that many of these companies were forced to lay off workers or decrease employee wages or hours in response to these challenges. According to PCBS, 90% of ICT businesses in Palestine experienced reductions



in sales and/or production averaging 54% during the initial lockdown period.²⁸

In addition to the operational difficulties brought on by the pandemic, the ICT sector in Palestine faces broader challenges, the most significant of which are dual use restrictions that block or slow the import of key inputs. The GoI places these restrictions on products that it considers to have potential military uses alongside their civilian purposes. According to the World Bank, although restrictions on dual use goods are not uncommon internationally, the broad nature of the restrictions placed on goods entering Palestine mean that most spare parts, home appliances, medical equipment, and machinery are affected.²⁹

These restrictions have created significant barriers to the importation of ICT equipment to Palestine and have resulted in the blockage of some products as well as protracted transfer licensing processes for others. One-time transfer licenses can require a wait of up to 289 days for new equipment types and 52 days for equipment types that were previously approved. These processes create significant up-front risks for Palestinian ICT businesses that are importing equipment, as licenses can only be requested after businesses have completed the purchase of the equipment. They also put Palestinian businesses at a competitive disadvantage to Israeli businesses, which are not subject to the same restrictions.³⁰

These challenges are particularly significant in Gaza, where between 70-80% of technology items are considered dual use. The challenge of importing new equipment into Gaza has led the sector to focus on repairing existing equipment rather than importing new equipment.³¹ An industry representative interviewed for this report noted that prolonged approval procedures on equipment imports to Gaza have constituted impediments to companies operating in the software, communi-

cations, and internet service provision industries.

These legal restrictions have hindered the maintenance and development of telecommunications services in both the West Bank and Gaza, a factor that creates further challenges to developing the ICT sector. For example, in the West Bank, restrictions on the importation of spare parts and equipment have prevented Palestinian companies from being able to use existing telecommunications infrastructure, namely switches and substations. In addition, restrictions on the importation of high capacity microwave equipment have limited telecommunications service expansion. In the West Bank, these restrictions have led many to access services through Israeli carriers, rather than through Palestinian firms, whereas in Gaza, they have left residents with outdated infrastructure. Within this context, the growth of the ICT sector in Palestine has not kept pace with that observed in Jordan.³²

The expansion of the ICT sector in Palestine will be critical for ensuring sustained economic development and employment opportunities for Palestinian youth

Despite these challenges and the setback of the pandemic, multiple recent developments point to the sector's potential to offer youth employment opportunities in the coming years. The launch of the Digital West Bank & Gaza project in early 2021, supported by a \$20 million grant from the World Bank, aims to expand high-speed broadband ser-



vices and develop fiber optic infrastructure, as well as contribute to a supportive regulatory environment for the expansion of the digital economy. The project will also help operationalize the Palestinian Telecommunications and Information Technology Regulatory Authority and provide the MTiT with technical assistance on optimizing the purchase of broadband services and internet bandwidth. Lastly, the project will support the development of e-government services through the implementation of relevant technology solutions and support for legal and regulatory changes required to enable these services.³³

In addition, negotiations between Israeli and Palestinian officials in November 2021 resulted in tentative approval from the GoI for an upgrade to 4G cellular service. However, the timeline for the final approval and rollout of the technology is not currently clear, and observers have noted that the technology is already behind the 5G technology being implemented in many other countries, including Israel. Nevertheless, it would represent an improvement from the 3G technology currently operating in the West Bank and 2G technology currently operating in Gaza.³⁴

Recent developments also point to the potential for a limited number of Palestinians trained in IT to seek job opportunities in Israel. In early November 2021, the Israeli cabinet agreed to extend permits for Palestinians to work in Israel's technology sector to respond to a labor shortage in the field. However, the number of permits approved remain relatively small at 200 for 2022, 200 for 2023, and 100 for 2024.³⁵ Although this development has the potential to provide additional employment opportunities for some Palestinian youth, the expansion of the ICT sector in Palestine will be critical for ensuring sustained economic development and employment opportunities for Palestinian youth.

The majority of subject matter experts and key stakeholders consulted thought that virtual freelance jobs through the gig economy were one of the most promising avenues of employment for youth in Jordan and Palestine, particularly youth in Gaza

Virtual Jobs

Interest in the promise of virtual jobs to expand economic opportunities around the world has been growing in recent years. The majority of subject matter experts and key stakeholders consulted for this report thought that virtual freelance jobs through the gig economy were one of the most promising avenues of employment for youth in Jordan and Palestine. This was particularly true for Gaza, which multiple interviewees described as a hub for tech innovation in the region due to the limited nature of alternative employment opportunities. However, some interviewees noted concerns about the long-term economic implications of becoming too reliant on outside companies and employment opportunities, and preferred instead to focus on developing the local Jordanian and Palestinian economies. Yet, given the job shortages in both Jordan and Palestine, many stakeholders believed virtual jobs should be encouraged and prioritized.



Virtual freelancing jobs vary greatly in complexity, making it possible for individuals from different backgrounds to access them. Stakeholders interviewed for this report described a number of types of jobs that could be completed virtually for companies and clients elsewhere in the MENA region and around the world, including translation services, graphic design, advisory services, journalism and podcasting, web design, computer programming, and gaming. In addition to these more complex job types, microwork opportunities are also available online. Microwork encompasses small, discrete tasks that do not require a high level of technical knowledge to complete, such as image tagging, transcription, proofreading, data verification, and data input.³⁶ Some subject matter experts noted that microwork could present an opportunity for vulnerable individuals to work in this sector. However, many opportunities require more advanced technology skills, which are sometimes out of reach for individuals who have limited access to higher education.

Some subject matter experts and key stakeholders interviewed for this report noted that virtual freelance work could be a particularly attractive opportunity for women and people in rural areas across Jordan and Palestine because it allows individuals to generate income from home, thereby helping them overcome transportation-related challenges, and provides more flexibility in terms of hours and scheduling. However, Gaza Sky Geeks, a code academy, startup accelerator, and co-working space in Palestine, has noted a distinct gender gap among its freelancing program participants, even prior to the pandemic. Specifically, female participants typically earned half the amount of their male peers for their online freelancing work, with women tending to have fewer clients and jobs on average.³⁷

In addition, the wider ICT field in Jordan and Palestine suffers from a gender gap, as evidenced by

87% of unemployed youth in Jordan and 80% of those in Palestine indicated that they were interested or extremely interested in virtual jobs

data collected from the LinkedIn Talent Insights tool as part of this study. As of December 2021, only 27% of individuals on LinkedIn who were working in the information technology & services and telecommunications fields in Jordan were women. In Palestine, the share was only 26%. The gender gap in digital employment facing refugee women in Jordan has also been documented.³⁸ As such, although the ICT field and virtual jobs have the potential to offer important employment opportunities for women, workforce development organizations intending to support women in securing economic opportunities in these fields will need to examine the barriers that have prevented greater levels of female participation and work collaboratively with women to propose potential solutions.

Youth Interest in Virtual Jobs

In order to assess the potential for developing youth opportunities in virtual jobs from the labor supply side, the youth survey conducted under this study asked unemployed youth in Jordan and Palestine about their level of interest in working in virtual jobs. Virtual jobs were described to respondents as jobs involving teleworking 100% of the time for a company that is either based in their home country or another country.

Youth in both Jordan and Palestine who were cur-



rently looking for jobs expressed a high level of interest in virtual jobs. In Jordan, 72% of youth indicated that they were interested and 15% indicated that they were extremely interested, and in Palestine, 53% of youth indicated that they were interested and 27% indicated that they were extremely interested. Only 3% of youth in Jordan and 8% of youth in Palestine indicated that they were not at all interested or not interested.

Although both young men and women expressed a high level of interest in virtual jobs, in Jordan, young men were slightly more likely than young women to express interest, and were nearly four times as likely as young women to indicate that they were extremely interested (41.5% of men compared to 11% of women). By contrast, in Palestine, young women were nearly three times as likely as young men to indicate that they were extremely interested in virtual jobs (31% of women compared to 11% of men). However, both young men and women in Palestine expressed an overall high level of interest in these opportunities, reaching 75% of young men and 81% of young women.

Although freelance work can offer flexibility and provide important income-generating opportunities, it lacks the stability and benefits that are conferred by formal, full-time jobs

In Jordan, refugee youth were more likely than Jordanian youth to express interest in virtual jobs, though both groups expressed a high overall level

of interest. Among refugee youth, 95% indicated that they were either interested or extremely interested in virtual jobs, compared to 84% of Jordanian youth. The intensity of interest was also higher among refugee youth, with 36% indicating that they were extremely interested compared to just 8% of Jordanian youth.

In Palestine, there was no statistically significant difference in the level of interest in virtual jobs between youth in the West Bank versus Gaza (Figure 44).

Potential Drawbacks of Virtual Jobs

It is important to balance the optimism around virtual jobs with an understanding of the drawbacks relative to other types of employment. Local stakeholders and subject matter experts noted that while some virtual job opportunities could be full-time positions with companies headquartered outside of Jordan and Palestine, the majority would be short-term freelance or “gig” assignments for individuals or small teams working together. Although freelance work can offer flexibility and provide important income-generating opportunities for youth in countries that do not produce enough jobs to meet the needs of their workforce, it lacks the stability and benefits that are conferred by formal, full-time jobs. In addition, virtual freelance workers are often not covered by government social protection schemes.³⁹

Some subject matter experts consulted for this report believed that the inherent lack of stability of freelance work would be a barrier to drawing youth in Jordan and Palestine to it since many prioritize job security and a stable income above other factors in employment. In addition, they felt that many vulnerable households living at or around the poverty line would not consider freelance work to be an ideal opportunity since their livelihoods rely on secure income.

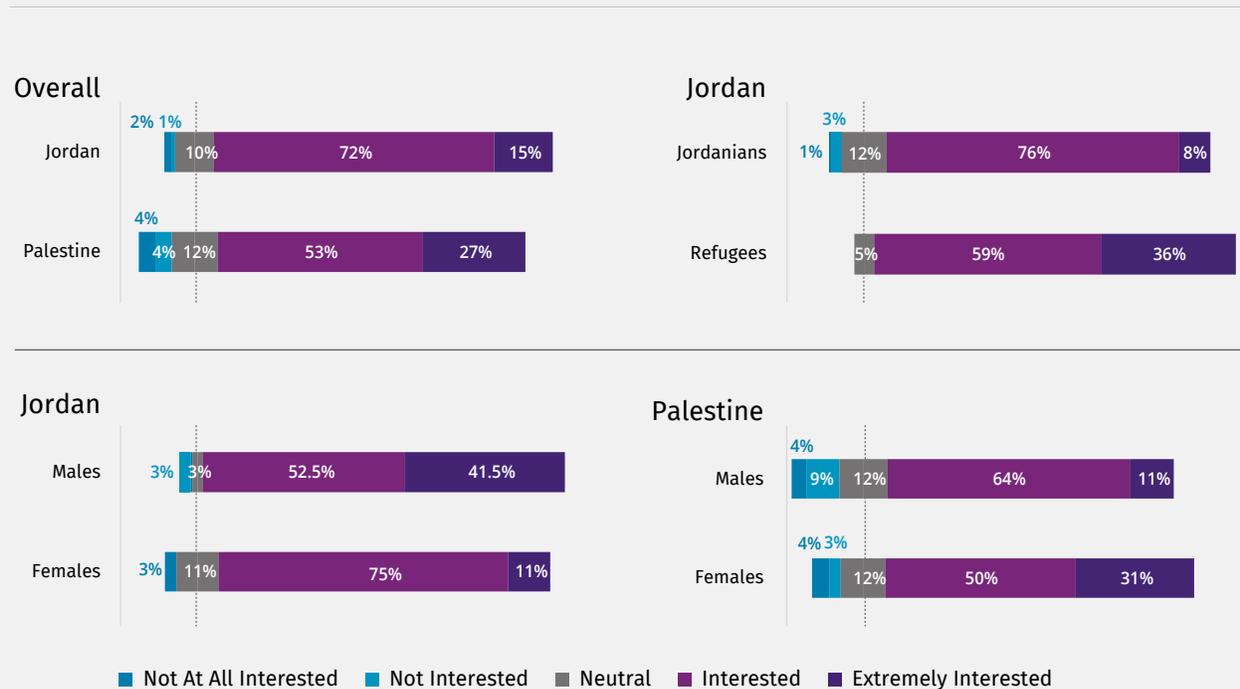


These concerns are not unfounded, as youth working in virtual freelancing opportunities did in fact experience instability in their employment situation following the start of the pandemic. Gaza Sky Geeks surveyed online freelancers in July 2020, 96% of whom were based in Gaza and the remainder of whom were based in the West Bank. Nearly all of those surveyed (89%) were under the age of 30. The survey found that 40% of respondents experienced a drop in income of 50% or more following the start of the pandemic, and 21% lost all income, regardless of whether they had been working in full- or part-time capacities and with no difference according to gender. In addition, 64% of freelancers experienced decreased demand, with the most significant drop felt by digital marketers and web developers,

and 53% experienced a decrease in the size and number of projects on offer on freelancing platforms. To compete within this environment, 27% of freelancers surveyed noted that they lowered their rates.⁴⁰

Despite the instability that freelancers experienced following the start of the pandemic, it is important to note that individuals in a wide variety of employment types experienced wage reductions and job losses during this period. As such, it seems that the drawbacks of virtual freelancing work are most relevant during times of relative economic stability when more secure forms of employment are available. The drawbacks of virtual freelancing opportunities would seem to lessen within environments where an insufficient

Figure 44: Unemployed youth in Jordan and Palestine expressed a high level of interest in working in virtual jobs



Source: Youth Survey. Total N=438. Jordan: N=215 (Jordanians: 157; Refugees: 58; Males: 36; Females: 179); Palestine: N=223 (Males: 54; Females: 169). There was no statistically significant difference in the level of interest in virtual jobs between youth in the West Bank versus Gaza.



number of full-time, formal jobs are available, such as in Jordan and Palestine.

Feasibility of Virtual Jobs

In addition to understanding these potential drawbacks, it is also important to understand the potential feasibility challenges to youth success in virtual jobs so that interventions aimed at helping youth transition into these opportunities can provide relevant support. Key challenges can include limited digital and English language skills, difficulties in maintaining cost competitiveness, and limited access to technology equipment, stable electricity, sufficiently strong internet, and DFS.

Although limited English language skills can constitute a barrier to working in virtual jobs with international clients, key stakeholders interviewed for this report noted that there were many opportunities with companies based in the MENA region that can be completed in Arabic. In particular, these opportunities are sourced from Gulf countries such as Saudi Arabia, the UAE, and Oman.

Subject matter experts interviewed for this report noted the potential challenge of cost competitiveness, as salaries in Jordan and Palestine are relatively high compared to those in other countries competing for virtual gig opportunities around the globe. Some interviewees acknowledged that individuals in Gaza were actually better positioned in this area, because salaries are generally lower there than in the West Bank or Jordan. One local stakeholder consulted in Gaza noted that for clients in Gulf countries, the fees that freelancers in Gaza charge for their services present significant value for money.

As for access to suitable technology, although smart phone penetration is fairly high in both Jordan and Palestine, access to computers is more

limited. A UNDP survey conducted after the start of the pandemic found that only 13.5% of individuals in Jordan have access to a laptop computer and 4.2% have access to a desktop computer. In addition, these rates vary significantly by governorate. For example, 16% of respondents in Amman indicated that they had access to a laptop compared to only 6% in Zarqa.⁴¹ In Palestine, access to computers was higher, with 24.3% of households in the West Bank and 18.1% of households in Gaza having laptops and 10.4% of households in the West Bank and 3.9% of households in Gaza having desktop computers, according to PCBS. Overall rates of laptop, desktop, and tablet ownership were similar in urban and rural areas in Palestine, but were lower in refugee camps.⁴²

In addition to access to needed technology equipment, access to stable internet and electricity connections can pose a challenge. In the same UNDP survey referenced above, only 53.9% of re-

Key feasibility challenges to youth success in virtual jobs can include limited digital and English language skills, difficulties in maintaining cost competitiveness, and limited access to technology equipment, stable electricity, sufficiently strong internet, and digital financial services



spondents in Jordan agreed somewhat or strongly that they had sufficient internet access to allow themselves and their families to carry out necessary activities such as shopping, education, and work.⁴³ In Palestine, 83.5% of households in the West Bank and 72.7% of households in Gaza have home internet connections, with similar access levels in urban and rural areas, but slightly lower access levels in refugee camps.⁴⁴

Despite the relatively high level of home internet access in Palestine, however, local stakeholders consulted for this study noted that in Gaza in particular, residents face frequent electricity and internet outages as well as slow internet speeds, which can affect workers' ability to complete online freelance assignments on schedule. To respond to these challenges, gig workers in some areas of Gaza have formed incubators or co-working spaces that offer more reliable internet and other services. However, one local stakeholder noted that some cities, such as Rafah, lack these types of facilities, making it more challenging for people from these areas to access virtual freelancing opportunities.

The same survey referenced above that was conducted by Gaza Sky Geeks confirmed that internet connection quality can be problematic for virtual freelancers in Gaza, with 42% of surveyed freelancers noting it as a challenge. In addition, 29% of surveyed freelancers noted that an increase in the number of hours in which they had electricity would be helpful.⁴⁵

Access to consistent electricity is also a challenge for individuals residing in refugee camps in Jordan. In the Azraq and Zaatari camps, 13 and 12 hours of electricity, respectively, are provided each day.⁴⁶

Lastly, access to banking services, including DFS, constitutes an important challenge that some

youth face in pursuing virtual freelancing opportunities. This challenge is most significant for women as well as refugees in Jordan. In both Jordan and Palestine, women have significantly lower levels of bank account ownership than men. Formal bank accounts are important for facilitating virtual freelance work because they are often required for individuals to access digital payment platforms. According to the World Bank, although bank account ownership has been on the rise in Jordan, just 56% of adult males and 27% of adult females had an account as of 2017. In Palestine, account ownership was lower, with just 34% of adult males and 16% of adult females having bank accounts.⁴⁷ In addition, refugees living in Jordan are not legally allowed to open local bank accounts.⁴⁸

Interviews with local stakeholders consulted for this study noted that gig workers in Gaza face digital payment restrictions that can make it difficult for them to receive payments for completing virtual projects. This challenge leads many Gazans working in the virtual gig economy to find ways around these limitations by using local digital payment systems such as the local Palestinian PalPay platform, as well as less secure approaches, such as middlemen. Some also use Western Union's network to receive payments for their jobs completed for international clients. PayPal is currently not offered in Palestine, leading some in Gaza to organize campaigns to pressure the company to enable its services. Some working in virtual freelancing in Palestine have found that potential clients are unwilling to hire them if they cannot receive payments from the platform.⁴⁹

Given these considerations, an expansion of stable access to DFS will constitute a key success factor in supporting the expansion of virtual jobs as a promising economic activity for youth and vulnerable populations in Jordan and Palestine.



Youth Opinions Regarding Feasibility of Virtual Jobs

Respondents to the youth survey who were currently looking for a job were asked to indicate how feasible they thought it would be for them to work in a virtual job. It was explained to them that virtual jobs typically require consistent access to electricity and internet from their location or residence. Most youth in Jordan and Palestine stated that it would be either feasible or very feasible for them to work in a virtual job, reaching 97% in Jordan and 86% in Palestine. However, the share of youth who indicated that it would be very feasible was higher in Jordan (78%) compared to Palestine (61%) (Figure 45).

In Jordan, young men were more likely than young women to indicate that it would be very feasible (92% compared to 76%), but there was no statistically significant difference between the responses of young men and women in Palestine. There were also no significant differences in the responses of Jordanians and refugees living in Jordan, or in the responses of youth in the West Bank versus Gaza. This is surprising given the differing levels of vulnerability between youth belonging to each group. It is possible that youth responses were partially informed by their aspirations to work in virtual jobs, or to secure employment more generally, and thus may have overestimated their feasibility to some extent.

Youth who indicated that virtual jobs would not be feasible for them were asked to identify the main issues that they would face. Youth in both Jordan and Palestine were most likely to mention internet connectivity and electricity issues. However, youth in Jordan were 80% more likely than youth in Palestine to cite internet connectivity as a concern, and youth in Palestine were more than twice as likely as those in Jordan to mention electricity connection as a concern. The high proportion of respondents in Palestine who felt that the

electricity connection would be an issue is likely due to the fact that 94% of youth who indicated that virtual jobs would not be feasible for them were based in Gaza, where electricity outages are common (Figure 46).

In Jordan, all of the young men who responded to the question cited either internet connectivity or electricity connection as the challenge they would face, whereas young women cited a number of additional challenges such as a lack of desire to work in virtual jobs (5%), and challenges with self-management, inability to deliver products, lack of financing, and lack of a suitable workspace (2% in each case). There were no statistically significant differences between the responses of Jordanians and refugees living in Jordan.

In Palestine, there were no significant differences in the responses between young men and women. Statistical significance testing was not completed to compare responses between the West Bank and Gaza, as the respondent subgroup for this question only included five individuals from the West Bank.

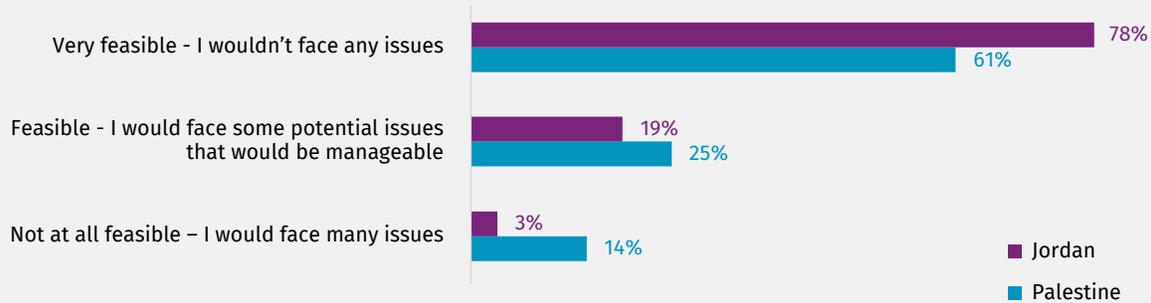
Potential for Youth Employment in the ICT Sector & Virtual Jobs

The ICT sector and virtual jobs offer a very promising avenue for youth employment in Jordan and Palestine, and one in which youth appear to have a high level of interest. The focus that the GoJ and the PA are placing on the sector, in addition to the World Bank-funded initiatives in each, has the potential to foster an enabling environment within which ICT employment can develop. In addition, the related technology-enabled BPO sector holds significant promise for job growth, much of which would be suitable for new entrants to the labor market.

Youth success in the field will require a focus on skill building aimed at bringing the technical

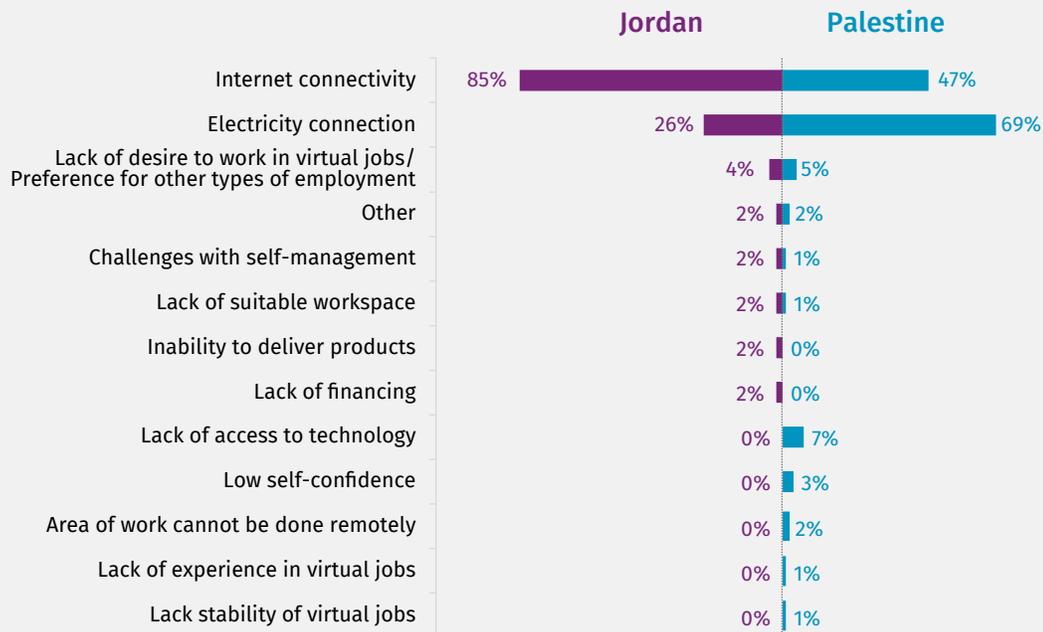


Figure 45: Most unemployed youth in Jordan and Palestine felt that working in virtual jobs would be either feasible or very feasible for them



Source: Youth Survey. N=438 (Jordan: 215; Palestine: 223).

Figure 46: Among youth who felt that virtual jobs would not be feasible for them, youth in Jordan were most likely to cite internet connectivity issues as the main issue they would face, whereas youth in Palestine were most likely to cite electricity connection issues



Source: Youth Survey. N=134 (Jordan: 47; Palestine: 87). Among youth respondents to this question in Palestine, 94% were located in Gaza, which likely contributed to the large share of youth who felt that electricity connections would be an issue.



skills of youth, sometimes gained through university training, into line with the needs of the market. In the case of virtual freelancing jobs, skills of varying complexity can be developed in order to meet different market niches, ranging from tasks such as photo tagging to more complex work such as data science. English-language skills should be a focus for youth who wish to work with markets outside of the MENA region. In addition, there is significant potential for complementarities between technical ICT/virtual freelancing programming and entrepreneurship training.

The pandemic highlighted the importance of the agricultural sector to the food security and economies of both Jordan and Palestine

However, as detailed above, ICT and virtual jobs in Jordan and Palestine are not without their challenges. Access to needed technology such as computers, as well as stable internet and electricity connections can pose an issue. The Tech Hub model included in the Youth, Technology and Jobs Project in Jordan holds promise for helping youth in underserved areas overcome these access barriers.

In addition, in the case of virtual freelancing, coordination among freelancers or the formation of firms that then hire freelancers may constitute effective approaches to help youth secure a greater number of contracts. Industry representatives consulted in Jordan noted that some individuals find it challenging to attract new business, es-

pecially with clients abroad, so firms that serve this function locally could result in expanded opportunities. Industry representatives in Gaza also cited this as a promising approach, in addition to noting the role that central offices or tech hubs have played in securing needed access to technology, internet, and electricity.

Additional care will need to be taken to develop these opportunities for refugees in Jordan and young women in both Jordan and Palestine given their lower rates of representation in these fields. Programming focused on employment for refugees in Jordan will need to emphasize virtual freelancing to a greater extent than formal employment in the ICT sector given that ICT is currently a closed sector for Syrians, unless they have a Jordanian business partner.⁵⁰

Lastly, financial inclusion should be a key consideration in programs aimed at increasing youth employment in virtual jobs in particular given the role that DFS play in delivering payments for services. Given their significantly lower rates of bank account ownership, efforts in this area should place particular attention on young women. For refugees living in Jordan, this will be more of a challenge due to the prohibition on their ownership of bank accounts.

Agriculture

Key stakeholders and subject matter experts in both Jordan and Palestine who were consulted for this report identified agriculture as a promising sector for employment in the coming years, as did 12% of refugee respondents to the youth survey, 4% of Jordanians, 4% of respondents in the West Bank, and 3% of respondents in Gaza. However, none of the employed youth respondents in Jordan were currently employed in agriculture, and only 4% of employed youth in the West Bank and 3% in Gaza were employed in the sector.



Key stakeholders and subject matter experts noted that the pandemic highlighted the importance of the agricultural sector to the food security and economies of both Jordan and Palestine. Jordan and Palestine experienced disruptions to the food supply chain due to the suspension of food imports during the pandemic's early stages. Food imports and exports have resumed, but prices for food have increased for consumers.⁵¹ In Palestine, small agricultural producers struggled to maintain operations in the face of increased costs of imported inputs and decreased local demand that resulted from the pandemic's impact on household incomes.⁵²

Given these trends, some key stakeholders and subject matter experts consulted for this report emphasized the importance of further developing the agriculture sector within both Jordan and Palestine to enable the sustainable production of a greater amount of food domestically and to avoid an overreliance on imports.

Interviewees in both Jordan and Palestine felt that the agriculture sector had the potential to create a variety of high- and low-skilled jobs for workers from various socioeconomic backgrounds. They noted that traditionally, agriculture and agribusiness employ a large number of vulnerable workers, and that the industry is often viewed as offering only low-skilled jobs involving manual labor. They further highlighted that this perception can diminish youth interest in the sector, noting the need for government and economic stakeholders to clarify its potential for youth.

Key stakeholders and subject matter experts also emphasized the need for increased innovation, technology integration, and sustainability in the sector given the reality of water scarcity and climate change that both Jordan and Palestine face. They noted that bringing innovations to the field could be associated with higher-skilled employ-

ment opportunities. Lastly, they mentioned that workers in the agriculture sector could benefit from receiving training in topics such as value chain management, marketing, and e-commerce in order to improve agricultural productivity.

The Agriculture Sector in Jordan

Agriculture makes up 3.8% of Jordan's GDP.⁵³ After a precipitous decline in the contribution of agriculture, forestry, and fishing to the country's GDP during the 1990s, the sector's contribution has increased steadily over the past 20 years.⁵⁴ However, the share of national employment made up by agriculture has gone down over the same period. In 1999, the share of total employment in agriculture was 4.3%, compared to 2.5% in 2019.⁵⁵ These figures exclude individuals engaged in small-scale farming and casual agricultural labor, however.⁵⁶ The agricultural labor force in Jordan, like many places in the world, is characterized by a high level of informality.⁵⁷

Despite the sector's relatively small contribution to GDP, agriculture exports made up 18% of Jordan's exports overall as of 2016. The only sector that surpassed agriculture in terms of export value was the chemicals sector.⁵⁸ Data from the Jordan Chamber of Industry (JCI) indicates that the sector's exports remained resilient even in the face of the pandemic. Food and agriculture exports during the first three quarters of 2020 totaled JD 233 million, higher than the JD 216 million that they garnered during the first three quarters of 2019.⁵⁹

The GoJ views agriculture as a strategic sector that is critical for realizing social, food, and economic security.⁶⁰ The labor-intensive nature of agriculture and its connection to the wider food value chain means that investments in the sector have the potential to generate a significant number of jobs and reduce poverty.⁶¹



The labor-intensive nature of agriculture and its connection to the wider food value chain means that investments in the sector have the potential to generate a significant number of jobs and reduce poverty

Jordan's 2020-2025 National Agricultural Development Strategy calls for boosting the sector's contribution to GDP to JD 3.66 billion by 2025, up from its contribution of JD 2.6 billion in 2020, and for taking steps to facilitate an increase in agricultural exports and a strengthening of the agro-processing chain. On the employment side, the strategy calls for replacing 21,000 foreign agricultural workers with Jordanian nationals and creating 65,000 new jobs. Digitalization, the incorporation of modern technologies, and upskilling will play a central role in the strategy. As part of the plan, the government aims to establish 17 centers that will provide training on agricultural technology in addition to providing general services. The government is also considering legal reforms to support the sector and will waive certain fees for agricultural businesses and cooperatives.⁶²

The GoJ is in the process of creating an action plan built on the agricultural strategy. Through this process, it aims to increase the sector's competitiveness, job creation potential, and contribution to local communities, in addition to increasing the focus on food manufacturing.⁶³ Furthermore, the agriculture sector in Jordan is receiving sup-

port under Program for Results: Economic Opportunities for Jordanians and Syrian Refugees, a World Bank program. The program aims to improve working conditions in the sector through improved regulation and to implement a new inspections system. Labor regulation efforts will be pursued in partnership with the ILO and the Jordanian MoL, and efforts to improve the inspection system will be supported by the International Finance Corporation (IFC).⁶⁴

The Agriculture Sector in Palestine

The agriculture sector is a strategically important sector in Palestine and is closely tied to Palestinian identity. Yet despite its importance, the share of GDP derived from agriculture has diminished sharply over the past several decades, representing 3.2% of GDP in 2019 compared to 30% in 1970. The reduction in the share of GDP that is made up by agriculture is partly due to the expansion of other sectors in Palestine such as IT, construction, and services.⁶⁵ However, restrictions on movement as well as access to land and water resources, export markets, and key agricultural inputs such as fertilizers have also limited the sector's expansion.⁶⁶

Employment in agriculture has also diminished significantly over time, representing a mere 6.7% of employment in Palestine in 2017 compared to 16.7% in 2006. Furthermore, more than half of Palestinian farms operate through the use of permanent or temporary family labor.⁶⁷ The sector offers the lowest wages compared to other sectors and is characterized by a high level of casual labor. Among workers in the sector, 48.4% of women and 31.6% of men work less than 14 hours per week.⁶⁸

There are a number of challenges that stand in the way of developing the agricultural sector in Palestine, the most significant of which are restrictions imposed by the GoI on Palestinian access to land



The agriculture sector is a strategically important sector in Palestine and is closely tied to Palestinian identity

and water resources. In the West Bank, these restrictions are felt most strongly in Area C, which comprises 61% of the area of the West Bank and almost all of its agricultural land.⁶⁹ In the case of Gaza, 29% of suitable agricultural land has been lost to a security buffer zone located between Gaza and Israel, which Palestinians are not permitted to access.⁷⁰

Additional challenges include the small and fragmented nature of landholdings, the sale of subsidized agricultural products from Israel in the Palestinian market, urbanization of lands previously used for agriculture,⁷¹ as well as limitations in access to agricultural inputs and markets.⁷² Furthermore, the May 2021 hostilities in Gaza resulted in an estimated USD 103 million in damage to the sector.⁷³

These challenges have contributed to a resulting low level of productivity in the Palestinian agricultural sector. Although Jordan and Palestine have similar environmental conditions, agricultural yields in Jordan are double those in Palestine.⁷⁴

The Palestinian MoA has been working to develop the potential of the agriculture sector through a well-defined sector strategy. The strategy aims to boost the sustainability of the agriculture sector and farmers' connection to their lands, increase the contribution of agriculture to food security and GDP, boost its productivity and competitive-

ness within local and international markets, provide quality services to support the agricultural value chain, and improve relevant institutional and legal frameworks.⁷⁵

A 2019 report on Palestinian agriculture produced for the Food and Agricultural Organization of the United Nations (FAO) highlights the potential for policy efforts to increase youth employment in the agricultural and agri-food sectors. The authors note that youth tend to seek employment in other sectors due to societal attitudes toward work in agriculture, the sector's weakness, and a lack of access to needed land and technology. They also note that when compared to employment opportunities in other sectors as well as those offered within Israel, wages in the agricultural sector are low. Notwithstanding these challenges, the authors conclude that support for youth startups in agriculture could help promote youth employment in the sector.⁷⁶

Industry experts have noted the need to develop skilled labor to support the agricultural sector as well as the need to improve the function of agricultural marketing in Palestine by strengthening specialized private companies working in the sector. The importance of improving the legal system in relation to workers in the sector as a means to attract more women and youth has also been noted.⁷⁷

There are efforts underway in Palestine to promote entrepreneurship of young university graduates in the agriculture field. For example, the FAO Country Programming Framework for Palestine for 2018-2022 contains a focus on inclusion for women and youth⁷⁸ and the organization is currently engaged in programming in partnership with the Palestinian MoA and local universities that aims to prepare 250 youth to create entrepreneurship projects in the sector.⁷⁹



Potential for Youth Employment in the Agriculture Sector

The significant focus and investment that the GoJ and its international partners including the World Bank, ILO, and IFC are placing on developing the agriculture sector as a driver of growth indicate that the sector could generate a significant number of jobs in the coming years, including technology-enabled jobs. In addition, efforts to reduce the number of migrant workers in the sector would create opportunities for Jordanians as well as refugees living in Jordan.

Youth workforce development programming relating to agriculture in Jordan could focus on a number of areas including wage employment, entrepreneurship, and technical skills of varying complexity depending on the target job types. Given the breadth of the field and the potential for a wide range of entrepreneurship project approaches, youth workforce development organizations wishing to deliver trainings relating to agriculture should closely engage with the Jordanian MoA as well as NGOs and international organizations operating in the sector at a technical level. Efforts should also include initiatives to increase the attractiveness of the sector for young people.

In Palestine, the potential for youth employment in the agricultural sector in the form of wage employment could develop if investment in the sector increases and the agriculture value chain is further developed. In the absence of investment, workforce development organizations are likely to face challenges in connecting youth with wage employment opportunities in the sector at a large scale given the small scale of operations of many producers, their significant reliance on family labor, the sector's typically low wages, and the recovery that the sector will need to undergo following the pandemic. These challenges are particularly significant for Gaza.

However, there may be potential for youth workforce development organizations to provide entrepreneurship programming focused on the sector, similar to that in which the FAO is currently engaged. Organizations wishing to deliver this type of programming in Palestine should first assess the scale of other trainings of this type being delivered contemporaneously in order to ensure that training activities are in line with the sector's absorptive capacity for new enterprises and that youth's proposed businesses offer sufficient variation within the market. In addition, given current youth attitudes toward the sector, such initiatives would likely benefit from an effort to communicate to youth why agriculture presents promising employment opportunities for them.

Food Processing

Although none of the respondents to the youth survey in Jordan and Palestine indicated that they worked in the food processing industry or that they felt the field would be a promising source of youth employment opportunities, the potential for the industry to provide job opportunities for youth is examined here due to the resiliency that the industry has shown throughout the pandemic.

A key stakeholder in Jordan noted the resilience of the country's food processing industry, citing its ongoing growth after the initial pandemic lockdown was lifted. Over the past two decades, food production in Jordan has continued to expand despite the closure of markets in Iraq and Syria as a result of conflicts. This expansion was made possible due to the high level of local consumption within Jordan. More than half of domestic consumption is supported by local food production and distribution.⁸⁰ While the pandemic affected food exports in the first months of the initial lockdown, they rebounded by June 2020, contributing to the growth of the industry overall compared to the previous year.⁸¹



During the 2021-2023 period, the GoJ aims to complement growth in the agriculture sector with an increase in the food industry's competitiveness and exports

Key stakeholders and subject matter experts in Palestine who were consulted for this report noted that food processing businesses increased production during the pandemic, and predicted that growth in this industry would continue in the coming years. As seen with the agriculture sector, the pandemic highlighted the importance of the food supply chain. This was particularly true for Palestine, where food insecurity affects 32.7% of the population. This challenge is even more acute in Gaza, where 68.5% of residents are food insecure.⁸² Subject matter experts noted that locally available, healthy food options quickly became critical after the start of the pandemic. In an effort to meet this demand, some local food production enterprises increased sales of processed food items during the pandemic, benefitting from the renewed importance of shelf-stable goods.⁸³

Although imports and exports have resumed in Palestine since the start of the pandemic, one subject matter expert reflected on the impact that the pandemic had on the food supply chain, especially during its early phases. The interviewee explained that these impacts included shortages in the agricultural workforce and the suspension of food exports. Key stakeholders also noted that the already high import fees affecting Palestine make the price of produce, meats, and dairy costly for many consumers.

The Food Processing Industry in Jordan

Food processing is a vital industry in Jordan, with a rich history of olive oil pressing and dairy product production contributing significantly to Jordan's economy. Although highly connected to agriculture and animal husbandry, food processing alone made up 4.13% of Jordan's GDP in 2016.⁸⁴ This industry continues to show between 2% and 4% growth each year, with major growth in the production of dairy products, vegetables, fruits, and nuts. Compared to 2019, exports of food, agriculture, and animal products increased by 8% in early 2020.⁸⁵ In addition, processed foods make up approximately 10.2% of Jordan's total industrial exports.⁸⁶ Although food and agriculture exports declined significantly in April and May 2020, they rebounded in June to reach levels beyond those recorded during the same period the year prior.⁸⁷

The food processing industry in Jordan consists primarily of small and microenterprises. Out of 2,645 registered food processing businesses in the country, more than 79% were classified as microenterprises by the JCI.⁸⁸ These enterprises constitute an important source of jobs, employing an estimated 50,000 Jordanians and Syrians.⁸⁹

Food processing was included as a target industry in the Jordan Vision 2020, with a focus on public-private partnership formation.⁹⁰ The GoJ continues to include food processing in its priority industries for the current strategic vision, emphasizing the integration of agriculture and manufacturing with food processing. During the 2021 through 2023 period, the GoJ aims to complement growth in the agriculture sector with an increase in the food industry's competitiveness and exports. In particular, there are plans to open factories for tomato processing and production by early 2023, which would specialize in the production of frozen tomatoes, tomato paste, and dried tomatoes.⁹¹



Concurrently, the MoA will work to garner investments for food processing in the private sector, with the goal of addressing several ongoing challenges, including insufficient marketing support and sales channels as well as limited packaging distributors.⁹²

The Food Processing Industry in Palestine

Since the first sweets and candy factory opened in Palestine in the early twentieth century, the Palestinian food processing industry has demonstrated strong adaptability in an ever-shifting environment.⁹³ While food processing represents only 2.8% of Palestine's GDP, it constitutes approximately one quarter of its total exports.⁹⁴ Similar to the agriculture sector, food processing involving traditional goods such as za'atar, tahini, and dairy products is closely tied to the Palestinian identity. In many small enterprises and cooperatives, these products continue to be processed manually, with many passing down recipes and processes from generation to generation.⁹⁵

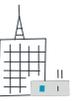
In 1995, the Palestinian Food Industries Union (PFIU) was founded to advocate for the estimated 18,000 food industry and cooperative employees it represents in the West Bank and Gaza. In order to achieve its goals of improving local production and quality, the union has partnered with international aid and private sector organizations including the Agence Française de Développement (AFD), Silatech, and UNDP.⁹⁶ These programs have focused both on creating jobs in the food industry and on increasing the capacity of existing factories to meet international quality standards.

While the PFIU works to build capacity and increase employment in larger processing factories, organizations such as American Near East Refugee Aid (ANERA) and the WFP continue to play a role in keeping small food processing and distribution businesses open. For example, the WFP contrib-

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utes greatly to the demand for locally processed goods by procuring items for their food baskets from local vendors to empower micro-, small-, and medium-sized enterprises (MSMEs) in the industry. In order to support these food processing enterprises directly, particularly those owned by women, the WFP uses cash-based transfers. Between 2011 and 2017, the WFP completed USD 170 million in cash-based transfers of this type in the West Bank and Gaza.⁹⁷

During the initial lockdown in Palestine in 2020, food processing enterprises, bakeries, and food distributors were permitted to continue operations, albeit with strict hygiene and social distancing measures in place. With fewer employees able to work per shift and purchasing power declining, production continued, but with sharply decreasing profit margins.⁹⁸ According to a study conducted by PFIU in the early stages of the pandemic, food processing plants in Gaza were more likely to close completely as a result of the economic situation compared to plants in the West Bank. In Gaza, 841 workers lost their employment when 14 of the 51 food processing companies closed during this period. In the West Bank, more than 2,000 employees moved from full-time to part-time work in order to comply with social



distancing regulations, leading to decreased incomes. Overall production dropped by 48% during this period.⁹⁹

In addition to these pandemic-related challenges, food processing plants in Palestine struggle to maintain their slim profit margins given the financial strains associated with customs fees on exports and required certifications. Under the Paris Protocol signed in 1994, the GoI controls customs and the movement of goods in and out of the West Bank and Gaza. The current situation creates challenges for Palestinian business owners, as they face high taxes to export products into Israel and struggle to compete locally with cheaper Israeli goods.¹⁰⁰ When goods are able to be exported from the West Bank, long processing times and a lack of appropriate cold storage facilities can lead to product waste.¹⁰¹

Additional restrictions placed on the export of processed foods from Gaza,¹⁰² as well as challenges to refrigeration due to inconsistent electricity¹⁰³ lend added complexity to the development of the food processing industry in Gaza.

Potential for Youth Employment in the Food Processing Industry

The GoJ emphasis on and investment in agriculture and food processing in its 2021-2023 Economic Priorities Program (EPP) indicates that the food processing industry could generate a significant number of jobs over the coming years. With the majority of Jordan's food processing enterprises being small, family-owned businesses, the opening of larger tomato processing plants through the government's strategy is likely to significantly grow the food processing industry's ability to export shelf-stable goods to foreign markets.

The GoJ prioritization of agriculture and food processing will likely present employment op-

portunities for youth in a wide variety of roles including sales, marketing, manufacturing, and management. Given that many of the businesses in the industry are MSMEs, there is also potential for self-employment training to prepare youth and women to create businesses in the industry. With no union currently representing the industry's enterprises, youth workforce development organizations should work closely with the MoA in order to secure partnerships with new factories to train and place youth and women in emerging employment opportunities.

Self-employment training tailored to food quality assurance and distribution could support youth in launching food processing businesses in Palestine

In the case of Palestine, key stakeholders and subject matter experts thought it was likely that the food processing industry would continue to increase production and expand hiring in the coming years. They also emphasized that there are opportunities in the industry for youth and women, including recent graduates. Larger factories that continue to grow may offer both low- and high-skilled opportunities for youth with varying educational backgrounds including vocational and university degrees. Women are already prominent in the food processing industry in Palestine, as many work in microenterprises or cooperatives to process and store jams, pickles, and spices.¹⁰⁴ As such, there is a strong base in the industry upon which to expand women's employment.



Workforce development organizations can also engage Palestinian youth in the food processing industry through self-employment. Given that the majority of the industry is made up of MSMEs, there are opportunities for youth and women to engage in self-employment by selling products locally in both Gaza and the West Bank. Self-employment training tailored to food quality assurance and distribution could support youth and women in launching food processing businesses.

The continued assistance of international aid organizations and the PFIU in providing critical support for capacity building and employment creation within larger plants and factories will be a supportive factor in expanding jobs in the industry. However, growth in the food processing industry outside of international aid and other local demand is dependent on the evolution of the agriculture sector more broadly, as well as on policies pertaining to exports from both Gaza and the West Bank.

There is limited visibility into the potential for exports of processed foods from Gaza to expand in the coming years. Therefore, food processing may present more opportunities for youth in the West Bank in the immediate term. Larger food processing factories continue to require support in marketing and quality assurance, and the PFIU serves as a robust advocate for ensuring that these needs are met through capacity building and employment programs. Youth workforce development organizations should engage both the PFIU and local food processing plants to identify specific opportunities for youth employment.

Digital Advertising and Marketing

Key stakeholders and subject matter experts in both Jordan and Palestine highlighted the demand for digital marketing skills in the wake of the pandemic and situated it within the larger de-

mand for employees with ICT skills. The ability to move sales and advertising online has been a key factor in supporting enterprise resiliency during the pandemic, leading many companies to seek this expertise. Key stakeholders and subject matter experts in Jordan and Palestine stressed that the need for advertising and marketing services is cross-sectoral, and therefore presents significant opportunities for employment, both with local businesses and through virtual freelancing work with international clients.

In addition to local demand, increasing demand for digital marketing across the MENA region could create added job opportunities for youth in Jordan and Palestine through wage employment at digital marketing firms or through virtual freelancing opportunities. Ad spending on Facebook and Instagram across the MENA region increased by 33% in 2021 alone, with heavy focus on retail and e-commerce companies.¹⁰⁵

A significant share of the respondents to the youth survey in Palestine were employed in the advertising and marketing sector a year and a half into the pandemic, reaching 13%. In Jordan, the percentage was smaller, accounting for 5% of employed youth. In both Jordan and Palestine, youth were highly optimistic about the potential of the advertising and marketing sector to hire young people over the next two years, including 32% of Jordanian youth and 25% of refugee youth in Jordan, as well as 43% of youth in the West Bank and 53% in Gaza.

The Digital Advertising and Marketing Sector in Jordan

With a young and digitally literate population, Jordan's mobile phone and social media use continue to rise, reaching 78% and 62% of the population in 2021, respectively.¹⁰⁶ Within these trends of increasing mobile phone and social media



Key stakeholders and subject matter experts in Jordan and Palestine stressed that the need for advertising and marketing services is cross-sectoral, and therefore presents significant opportunities for employment

penetration, the advertising and marketing sector in Jordan is evolving rapidly. The sector is relatively small and has been dominated by several large media and public relations agencies until recent years.¹⁰⁷ Studies of the digital marketing space highlight the low competition in search engine advertisements, pointing to the opportunity for growth of digital advertising as the country's consumers increasingly move online.¹⁰⁸

A rise of e-commerce has been observed in parallel to the digital expansion that has occurred over the last several years, bringing with it increased opportunities for digital advertising and marketing. However, e-payment use has been slow to catch on, with reported suspicions of online-only merchants as a reason cited for the slow adoption of e-commerce. In 2015, less than 30% of Jordanians used any type of mobile money or e-wallet.¹⁰⁹ The focus of the GoJ on financial inclusion through digital finance growth¹¹⁰ makes it likely that the e-commerce space will expand, and that the digital advertising and marketing space could grow with it.

Spending on digital marketing in Jordan has increased significantly, and is anticipated to reach

USD 106 million in 2021. By the end of 2025, an estimated 57% of total ad spending in Jordan will be mobile-based. Supporting this estimate, spending on social media ads has risen by a minimum of 10% each year since 2017.¹¹¹ Furthermore, digital marketing investment constitutes the bulk of total ad spending across the MENA region, representing 70% of all ad spending in 2020.¹¹²

The pandemic has significantly expedited digital transformation in the sector in Jordan. During the lockdown, the GoJ banned the printing and distribution of physical newspapers in an effort to reduce the spread of the virus.¹¹³ While traditional forms of media suffered, companies that adapted to online sales and advertising were more resilient.

Non-traditional sectors utilized digital marketing as well. In a study surveying more than 1,000 Jordanian enterprises, 43% of companies in the industrial sector had considered e-marketing as a way to enter new markets and recover from the COVID-19 crisis. Only 18% of companies surveyed were using web marketing platforms prior to the pandemic. During lockdown periods, the digital transformation of both marketing and payments became imperative in order for businesses to maintain and grow their customer bases.¹¹⁴

In addition, marketing factors significantly in the GoJ's strategic plans to revitalize the agriculture and tourism industries over the next two years. The GoJ plans to invest JD 7 million to establish a marketing company and online sales platform for agriculture by 2023. For tourism, the GOJ plans to invest JD 1.5 million to launch a wide-reaching marketing campaign to revive the sector and improve national branding strategies.¹¹⁵ Both initiatives, as well as the overall expansion of the sector, bode well for the growth of employment opportunities for youth in digital advertising and marketing in Jordan.



The Digital Advertising and Marketing Sector in Palestine

The emergent digital advertising and marketing sector in Palestine has been growing each year as social media and mobile phone use increase and MSMEs work to differentiate themselves in the market. Businesses in Palestine have a tendency to focus their advertising efforts on social media given the affordability and scalability of this type of digital marketing.¹¹⁶ The high level of mobile phone use in Palestine allows businesses to reach their customers directly through popular social media applications such as Facebook and Instagram. In 2021, the number of social media users in Palestine increased by 15% compared to 2020, reaching more than 60% of the population in the West Bank and Gaza.¹¹⁷

In recent years, much of the digital marketing efforts within Palestine have focused on e-commerce services. As of 2019, 1,000 Palestinian businesses were operating e-commerce pages, each spending an average of USD 5,000-10,000 on digital marketing.¹¹⁸

As the COVID-19 pandemic spurred lockdowns in Palestine, many MSMEs used social media to advertise for the first time in an effort to maintain their customer base.¹¹⁹ In order to meet this demand, local consultants and experts offer services specific to social media marketing across sectors. In addition, for entrepreneurs, digital marketing has become a critical skill in order to differentiate their products in the market and reach consumers. With rising unemployment rates in Gaza, many new graduates are turning to self-employment and using social media marketing to sell products, understand customer needs, and arrange for local deliveries.¹²⁰

Job opportunities in digital advertising and marketing in Palestine have typically been secured

With rising unemployment rates in Gaza, many new graduates are turning to self-employment and using social media marketing to sell products, understand customer needs, and arrange for local deliveries

through freelance work, facilitated by websites such as UpWork, where nearly 2,000 Palestinians offered e-marketing, web development, and design services in 2019.¹²¹

Potential for Youth Employment in the Digital Advertising and Marketing Sector

The developments in the digital advertising and marketing sector outlined above point to significant opportunities for youth in both Jordan and Palestine to gain employment in the sector.

As smaller, boutique marketing firms and freelance opportunities gain traction in Jordan, digital advertising and marketing are likely to offer both wage and self-employment opportunities for youth. The observed increase in ad spending in Jordan over the past five years, particularly on social media advertising, underscores the growing importance of advertising and marketing for the private sector as businesses seek to compete in the local market as well as internationally. Business resilience has depended heavily on the ability to “go virtual” during the COVID-19 pandemic. The Jordanian private sector is likely to continue prioritizing this in the coming years given the shift of many consumers online.



In Palestine, the expansion of the digital advertising and marketing sector also presents significant opportunities for youth to secure employment, particularly in virtual freelancing. Digital advertising and marketing holds additional promise for youth in Gaza, who face limited job opportunities locally.

The opportunity presented by the sector is two-fold, allowing youth to work remotely for companies abroad on the one hand, and enabling entrepreneurs to launch businesses that cater to local consumers on the other. Civil society organizations in Palestine are already providing trainings relating to advertising and marketing in collaboration with the Ministry of National Economy (MONE) and the PMA.¹²² There is potential to expand trainings of this type to prepare youth to succeed in the sector.

Youth workforce development organizations in Jordan and Palestine should include practical exercises in their digital marketing trainings in order to bolster graduates' portfolios and help them launch careers in the sector. As shown on freelance websites such as UpWork and Fiverr, evidence of prior work is imperative for growing a client base as a new marketer or designer. Additionally, organizations providing general trainings in entrepreneurship should include digital and social media marketing modules to provide graduates with the skills needed to successfully launch and market their own businesses.

Banking

Study results indicate that the banking sector may provide employment opportunities for youth in Jordan and Palestine over the coming years, but with limits to the number and location of opportunities. Among youth surveyed under this study who were working a year and a half into the pandemic, only 2% of youth in Jordan were employed

in banking/finance, compared to 9% of youth in Palestine. However, this difference may be due to the varying sector focus of trainings that surveyed youth received, as EFE-Palestine has implemented trainings focused on securing job placements in the banking sector.

Regarding youth perspectives toward the sector, only 1% of surveyed youth in Jordan and 5% in Palestine felt that banking/finance was likely to offer the most opportunities for young people over the next two years. Within Palestine, just 3% of youth in Gaza believed that it would be a top source of jobs for young people. However, youth in the West Bank saw promise in banking/finance, with 15% indicating that they believed the sector would offer the most job opportunities for young people.

Key stakeholders and subject matter experts consulted for this report diverged in their expectations for the banking sector in Jordan as a source of youth employment opportunities in the coming years. Some noted that while the sector contributes significantly to Jordan's GDP, its contribution to overall employment is less significant. When combined with the perceived desirability of employment in banking, this limited availability of positions makes employment in the sector competitive.

The banking sector may provide employment opportunities for youth in Jordan and Palestine over the coming years, but with limits to the number and location of opportunities



Key stakeholders and subject matter experts in Palestine did not focus on the banking sector as a future source of youth employment opportunities.

The Banking Sector in Jordan

The banking sector in Jordan is one of the most developed in the MENA region, governed by a robust set of legal frameworks and bolstered by government support. According to the CBJ, the financial sector constitutes 20% of Jordan's GDP, with commercial banks representing the majority of the sector. The CBJ was founded in 1964, and functions as the regulatory body of the banking sector in Jordan.¹²³ Although funded by the government, the CBJ is an independent financial institution. Twenty-five banks operate in Jordan, comprised of eight foreign and 17 Jordanian banks, three of which are Islamic financial institutions.¹²⁴ Across Jordan, there are 891 bank branches and 186 microfinance institution branches. Governed by several laws, banks in Jordan are able to provide security for depositors, reduce financial market risk, and prevent money laundering, all of which contribute to a high level of credibility for the country's banking sector.¹²⁵

Staffing in banking has expanded in parallel with the sector's growth. The total number of employees in banking rose 29.6% between 2009 and 2017. Of the 20,582 banking employees recorded by the Associated Banks of Jordan, the majority are young adults, with 64.9% of individuals in the sector being between the ages of 25 and 39. The majority of positions in the banking sector are located in Amman, accounting for more than 17,000 jobs. Men are overrepresented in the sector, holding more than 65% of positions.¹²⁶ In addition to digital transformation, the quality of human resources in Jordan's banking sector has been noted as an important factor for its strength. Maintaining quality human resources is critical given that the indus-

try must offer a high level of service quality and carefully adhere to government regulations.¹²⁷

The banking sector in Jordan continues to show immense resiliency in the face of changing regional and international landscapes. Measures of financial soundness such as liquidity, total assets, and loan compliance reflected continuous growth throughout the Syrian crisis.¹²⁸

Resilience has defined the sector throughout the COVID-19 crisis as well. Following the start of the pandemic, GoJ and CBJ worked to mitigate the impacts of the lockdown measures and the subsequent economic crisis. Measures included postponing loan installments from clients in heavily impacted sectors, postponing individual repayments on credit cards, home loans, and personal loans, and dropping interest rates from 4% to 2.5%.¹²⁹ Critically, banks increased liquidity by reducing their reserves by 2%, which freed up JD 550 million for credit, loans, and financing programs for MSMEs. The IMF measured the impact of these measures on Jordan's economic recovery, showing 6% growth in the private sector through 2020 and early 2021 in spite of the economic recession.¹³⁰ Despite an initial drop in bank deposits mid-year, banking sector activity actually grew by 6.4% in 2020, with total assets reaching 189% of GDP.¹³¹

Both the GOJ and the CBJ are prioritizing banking and finance as a key driver for economic development. The GoJ's 2025 strategy includes a two-pronged approach to accelerating progress in the sector through increasing bank loans provided to SMEs and expanding coverage of credit bureaus to reach 55% of adults in Jordan.¹³² To support the COVID-19 recovery, Jordan's EPP further emphasizes the need to provide support for SMEs, setting a target for the CBJ to lend JD 30 million to microfinance institutions by the end of 2022.¹³³



The Banking Sector in Palestine

Palestine began formalizing its banking sector in 1994, after the Paris Protocol imbued Palestinians with the authority to govern their own financial services to support growth of the economy.¹³⁴ As part of this formalization, the PA established the PMA, which is an independent and public institution charged with regulating the financial sector, including monetary and banking policy.¹³⁵ Although Palestine does not have a national currency, the PMA focuses on maintaining price stability and preventing inflation, regulating commercial banking practices, and promoting sustainable economic growth. Since 1994, the PMA has worked with the IMF and World Bank on risk management, in particular for Palestine's growing commercial banking sector.¹³⁶

As of 2021, there were 13 banks and eight micro-finance institutions operating in Palestine, with more than 380 bank branches in the West Bank and Gaza.¹³⁷ Although banks make up the majority of the sector, there are an additional 245 money exchange companies and four e-payment servicers licensed to operate. Foreign banks make up a significant portion of the sector, representing six of the 13 banking institutions. Competition in the sector, coupled with the lack of government bank ownership, has provided a level of insulation from both local and regional crises, as demonstrated throughout the COVID-19 pandemic.¹³⁸

To protect the economy against recession, the PMA undertook several protective measures at the beginning of the pandemic, including deferring monthly loan payments. According to the PMA, this measure added an estimated USD 1.5 billion in liquidity to the market.¹³⁹ Well-insulated from economic shocks, the banking sector continued to grow during the pandemic, with total

bank assets increasing by 11%, reaching 132% of GDP by September 2021.¹⁴⁰ Deposits also rose by 13.1%, highlighting both an increase in access to financial services and the credibility of Palestinian banks as resilient institutions during crises.¹⁴¹

In an effort to increase financial inclusion, the PMA is developing infrastructure for more robust DFS. In 2020, the PMA made several advances in digital transformation, launching an electronic clearing system for the most used currencies,ⁱ allowing for digital check cashing, and licensing four e-payment companies to begin establishing a presence in the West Bank and Gaza.¹⁴² E-payment and e-wallet servicers Jawwal Pay, PalPay, Middle East Payment Services, and Malchat Electronic Payment Services hope to provide critical financial access to those unable to access traditional banking and payment platforms, particularly those in Gaza.

Potential for Youth Employment in the Banking Sector

The recent growth, government support, continued resilience, and digital transformation occurring in the banking sector in both Jordan and Palestine suggest that it could constitute a source of employment opportunities for youth during the COVID-19 recovery.

The GoJ's 2025 strategy and EPP both state the government's intention to increase access to financial institutions, including through banking and credit accounts. The majority of Jordanians are not currently accessing formal financial systems,¹⁴³ which means that there is significant potential for the banking sector to grow. Given the GOJ's ambitious goal of connecting 55% of adults to credit bureaus,¹⁴⁴ financial institutions will likely need to hire additional human resources

i Because Palestine does not have its own currency, Palestinians use a mix of Jordanian Dinar, US Dollars, and Israeli New Shekels.



The majority of jobs in the banking sector are currently located in Amman, which limits the potential for employment opportunities in the sector for youth outside of the capital city

in order to provide services to a larger number of customers. As this expansion develops, youth workforce development organizations should interface with local banks in order to determine the skills that entry level employees will need to succeed in these positions.

Digital transformation is needed in order for the banking sector to continue expanding access to financial services for all Jordanians. In recent years, international NGOs have been heavily involved in digital banking in Jordan, and the country has seen high rates of adoption of online bill paying in the last five years.¹⁴⁵ However, there is still room for growth, particularly in the shift to online banking, peer-to-peer transactions, and e-wallets. Youth workforce development organizations may consider tracking emerging companies in the digital banking and e-wallet space to identify potential employers for youth trained in web development, app development, coding, or related areas.

The majority of jobs in the banking sector are currently located in Amman, which limits the potential for employment opportunities in the sector for youth outside of the capital city. Additionally, opportunities in banking are most accessible for youth who have completed university education.

An assessment of bank employees showed that more than 70% have bachelor's degrees.¹⁴⁶ Given these factors, workforce development organizations should consider both education level and access to major city centers when sourcing youth participants to join programming focused on the banking sector in order to maximize job placement potential.

The PA has not outlined banking as a priority sector for employment in its economic strategy for the coming years. However, the PMA's commitment to promoting financial access and inclusion and bolstering the private sector is supported by the PA's economic goals.¹⁴⁷ As explained above, financial institutions in Palestine have demonstrated resilience in the past two years, and they continue to grow. By September 2021, the number of bank employees was nearly double that in 2007, with 7,349 employees across the West Bank and Gaza.¹⁴⁸ The expansion of DFS could also increase the number of opportunities available in the sector.

Similar to Jordan, job opportunities in banking are not equally distributed across Palestine. Overall, the sector is more active in the West Bank, as evidenced by the fact that more than 90% of all bank deposits in 2020 originated from customers in the West Bank.¹⁴⁹ The opinions of respondents expressed in the youth survey under this study reflect this varying level of opportunity. As referenced previously, 15% of survey respondents in the West Bank felt that banking would offer the most job opportunities for youth over the next two years compared to only 3% of respondents in Gaza.

Given these considerations, youth workforce development programs focusing on the banking sector should primarily target the West Bank in order to maximize job outcomes. In Gaza, there may be some opportunity for employment with



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e-payment services given the significant need for alternative payment options. However, workforce development organizations wishing to work in this area should complete the necessary due diligence when selecting potential partners, particularly given the restrictions that exist pertaining to financial institutions in Gaza.

Construction

Local stakeholders and subject matter experts in both Jordan and Palestine noted that the construction sector has the potential to generate employment opportunities over the coming years. The Jordanian government's Economic Growth Plan and a number of economic studies confirm that the construction sector is likely to grow in Jordan alongside investments in transportation and other infrastructure. However, the potential of the Palestinian construction sector to generate opportunities is less certain, as a number of economic and political factors limit the industry's growth in the West Bank and Gaza.

Among employed respondents to the youth survey conducted under this study, 5% of Jordanian youth and 11% of refugee youth were working in the construction sector a year and a half into the

pandemic. In Palestine, 5% of employed youth in the West Bank and 1% of employed youth in Gaza were working in the sector.

Refugee youth in Jordan were more likely than Jordanian youth to believe that the construction sector would offer the most employment opportunities for young people over the coming two years, with 12% of refugees compared to just 4% of Jordanian nationals indicating as such. The larger share of refugee youth who felt that construction was a promising sector is likely due to the fact that the sector is open to Syrians and it has constituted a key sector of employment for them over the past several years. Youth respondents in Palestine were less hopeful about the employment prospects in construction, with only 3% of youth in the West Bank and 0.5% of youth in Gaza stating that the sector was promising.

The Construction Sector in Jordan

The construction sector is a major contributor to the Jordanian economy. In 2018, it accounted for approximately 5% of total GDP and ranked sixth among Jordanian sectors in terms of GDP contribution.¹⁵⁰ The Jordan Economic Growth Plan 2018-2022 (JEGP) named construction and agriculture as the country's fastest growing sectors, each averaging approximately 16% growth in 2015.¹⁵¹

The construction sector is highly interdependent with other economic sectors, including manufacturing, transportation, and other forms of industry. The Jordanian Business Association lists the sector's main activities as including the construction of buildings, roads, and private utilities, in addition to work pertaining to electrical installations, air conditioning, mechanical works, infrastructure, and completion and finishing of buildings.¹⁵²

The GoJ is heavily prioritizing the development



of the construction sector because it is viewed as a key driver of growth for other sectors and a necessary component to putting in place the required infrastructure to support Jordan's population surge.¹⁵³ Improving the country's transportation infrastructure has also been a major priority of the GoJ over the past several years. Significant projects have included the Amman-Zarqa Bus Rapid Transit, the Desert Road, Dead Sea bridges, and the Hadalat Road in northern Jordan.¹⁵⁴

The JEGP notes that over the next decade, the GoJ aims to make Jordan a regional center for architectural and engineering services in the Middle East in order to spur job creation and GDP growth.¹⁵⁵ The plan eyes Iraq, Syria and other neighboring countries as potential export markets for Jordanian companies to share architectural expertise, construction labor, and capital. Some of these efforts have recently come to fruition. For example, in September 2021, the Jordanian and Iraqi governments came to an agreement for Jordanian companies to implement engineering consultancy projects in Iraq.¹⁵⁶ The JEGP also includes a focus on quality control and meeting international best practices through increased training and education of workers, as well as an emphasis on more rigorous inspections of construction company outputs.¹⁵⁷

Although construction was growing in the years leading up to the pandemic, it did face a number of challenges that limited its growth. Jordan's efforts to decrease its national debt through austerity measures and higher taxes have limited investment and delayed some major projects. Additionally, as the GoJ began to phase out fuel subsidies in the 2010s as a method of addressing the national debt, the construction industry and manufacturers of building materials faced higher energy prices that increased their costs.¹⁵⁸

In addition to these challenges, the pandemic sig-

The pandemic significantly affected the construction sector in Jordan, both directly through movement restrictions, social distancing and other public health measures, and indirectly through decreased demand for private construction projects

nificantly affected the construction sector in Jordan, both directly through movement restrictions, social distancing, and other public health measures, and indirectly through decreased demand for private construction projects.¹⁵⁹ According to the World Bank, Jordan experienced a 3.8% decrease in construction activity in 2020 mainly due to a decline in investment.¹⁶⁰ The Jordanian Construction Contractors Association reported losses of approximately JD 100 million in the construction sector due to the pandemic, and noted that higher shipping prices led to a 45%-55% increase in the prices of construction materials.¹⁶¹ A report on the impact of COVID-19 on enterprises in Jordan published by the ILO, UNDP, and Fafo found that 45% of surveyed construction sector companies had laid off employees since March 2020.¹⁶²

Although the construction sector was heavily impacted during the initial months of the pandemic, the sector began to rebound after the Jordanian Ministry of Public Works and Housing began allowing construction companies to resume operations in April 2020. Work on major construction projects in the healthcare and transportation industries resumed immediately, and the Ministry



of Public Works and Housing began approving applications for private projects to resume work after screening them against safety protocols.¹⁶³ The Jordanian Department of Statistics noted that the construction sector achieved a growth rate of 5.7% between the second quarters of 2020 and 2021.¹⁶⁴

However, the confidence of construction companies in the industry's robustness and ability to resume profitable business after the pandemic has been mixed. Among construction companies surveyed by the ILO, Fafo and UNDP, only 31% stated that they were somewhat confident that business would rebound and 25% were somewhat unconfident.¹⁶⁵

The construction sector in Jordan is characterized by high levels of foreign and migrant labor, traditionally from Egypt. However, Syrian refugees have made up an increasing share of labor in the sector over the past decade. Jordanian nationals are significantly more likely than foreign workers to be formally employed in construction. According to the ILO, 91% of the approximately 33,600 Syrian refugees that worked in the sector prior to the onset of the pandemic did so without a work permit. In 2018, there were only 3,000 Syrian refugees registered as employees in the sector, compared to approximately 29,260 Jordanians and 9,210 Egyptians.¹⁶⁶

Construction workers in Jordan were vulnerable to the economic impacts of the pandemic, in part, due to the prevalence of seasonal and short-term contracts in construction, in addition to the high level of informal employment in the sector. Many employees were not enrolled in the Jordanian SSC and were therefore ineligible to receive government aid packages and benefits in the early phases of the pandemic.¹⁶⁷

Although the GoJ allowed informal workers to self-subscribe to the SSC during the pandemic,

some workers reported that they found the conditions and terms of enrollment too challenging and that they did not present an acceptable return on investment. Among workers that were enrolled with the SSC, many were still unable to receive government support because they were not the head of a household. Self-employed workers in the construction sector also reported to the ILO, Fafo and UNDP that they were not able to take out loans to support their businesses during the pandemic, either because of pre-existing debts, high interest rates, or because financial institutions would not finance businesses or workers that were not formally registered.¹⁶⁸

The Construction Sector in Palestine

The construction sector is an important industry and source of employment in Palestine and among Palestinians working formally and informally within Israel. PCBS reports that the construction sector employed 10,128 people in more than 660 enterprises in Palestine in 2018.¹⁶⁹

However, the sector faces challenges in both the West Bank and Gaza due to economic concerns as well as regulatory and other restrictions that inhibit its growth. Across Palestine, construction sector representatives note that building regulations are outdated and not up to the required standards. In addition, the GoI imposes restrictions on construction in Area C of the West Bank, leading residents of this region to build vertically within cities rather than horizontally across a wider area of land. Industry representatives claim that this has resulted in higher land prices and stymied economic development in rural areas.¹⁷⁰

The construction sector in Gaza faces even steeper challenges due to limited investment and significant restrictions on access to key construction inputs. The economic situation in the Gaza Strip has deteriorated sharply over the past two



decades, resulting in insufficient levels of liquidity and weak purchasing power among the Gazan population. This has been compounded by periodic hostilities in Gaza, which have destroyed much of the sector's infrastructure and manufacturing base. For example, a study by the Palestinian Federation of Industries states that the 2014 hostilities left more than 350 industrial facilities and 100 construction facilities destroyed, including steel and cement factories. The UN agreement following this conflict gave the GoI control over the entry of construction material into Gaza and required construction companies to seek approval from the GoI to carry out any project, which has greatly increased the costs and risks associated with construction work in Gaza.¹⁷¹

These factors have led many construction companies in Gaza to go bankrupt or relocate their businesses to the West Bank or abroad, a trend that continued up until the start of the pandemic. The Palestinian Federation of Industries has noted that the number of workers employed in the construction sector in Gaza saw a 42% drop between 2018 and 2019, decreasing from 3,168 in 2018 to 1,840 in 2019.¹⁷²

In addition to these challenges, companies operating in the construction sector in Palestine more broadly have faced both supply- and demand-side pressures as a result of the COVID-19 pandemic. A survey of 2,600 businesses conducted in 2020 by MONE and PCBS found that the construction sector experienced a 56% decline in average sales and production during the initial pandemic lockdown period from March through May 2020. The November 2020 press release on this survey noted that the construction sector reported the largest decline of all sectors surveyed because its activities were not deemed essential to the health and security of the Palestinian people during this time. On the supply side, 73% of construction sector businesses reported challenges in accessing

supplies of inputs, raw materials, and finished goods during the lockdown, further affecting their ability to operate effectively.¹⁷³

Israel relies heavily on Palestinian labor from the West Bank to make up nearly a third of its construction workforce.¹⁷⁴ Palestinian employment within Israel also constitutes an estimated 15%-20% of the Palestinian economy, and tens of thousands of Palestinian families rely on wages from this work.¹⁷⁵ Nearly 70,000 Palestinians from the West Bank were estimated to work in the construction sector in Israel at the beginning of the pandemic.¹⁷⁶

Palestinians working in construction in Israel were significantly affected by the public health measures instituted at the start of the pandemic. As explained in previous sections of this report, border closures instituted following the outbreak of COVID-19 halted movement between the West Bank and Israel. This measure disrupted the pattern of the 133,000 Palestinian workers who, prior to the pandemic, routinely traveled into Israel during the day for work but returned home to the West Bank in the evening. The GoI allowed some Palestinians in the construction sector to remain in Israel during this period, housed in employer-provided accommodations.¹⁷⁷ Although this led to a last-minute scramble for accommodations among Israeli construction firms and prolonged separations for many Palestinian workers from their families, it protected the incomes of tens of thousands of Palestinians during this time.¹⁷⁸

Potential for Youth Employment in the Construction Sector

Prospects for youth employment in the construction sector in the next few years are more promising in Jordan than in Palestine. The GoJ has heavily prioritized construction as a key component to other elements of its economic growth plan, and



the pandemic's impact on the construction sector in Jordan was more limited than on other sectors given that projects were gradually allowed to resume production as early as April 2020. The sector is also promising for employment of vulnerable youth, including Syrian refugees and youth with limited education, as Syrians are legally permitted to work in the sector and many jobs do not require a university degree.

Although the construction sector is likely to offer numerous employment opportunities for youth in Jordan, it is important that workforce development organizations and policymakers encouraging employment in the sector also prioritize labor rights, as abuses have been documented in the sector. For example, one study found that within the sector, there has been insufficient transparency in identifying risks to workers, an absence of adequate policies to protect the rights of refugees and migrant workers, insufficient engagement on core labor rights issues, and a lack of support for freedom of association and the right to collective bargaining.¹⁷⁹ These challenges must be addressed alongside employment promotion in the construction sector in order to ensure that economic growth brings high-quality jobs that protect the rights of workers.

The future of the construction sector is less clear in Palestine. In the West Bank, there is some promise for limited growth of the sector. PCBS has noted that the number of building licenses issued by the PA during the second quarter of 2021 increased by 118% compared to the second quarter of 2020. According to PCBS, a total of 2,659 new building licenses were issued during the second quarter of 2021, of which 1,661 were for new buildings.¹⁸⁰

However, the economic challenges and restrictions facing the industry in both the West Bank and Gaza are not likely to subside with the end of

Prospects for youth employment in the construction sector in the next few years are more promising in Jordan than in Palestine

the pandemic. The May 2021 hostilities inflicted significant damage on infrastructure in the Gaza Strip, but imports of construction materials remain highly restricted, stymying any large-scale rebuilding efforts that could take place. While a limited number of construction jobs may return to Palestine as the pandemic abates, significant growth in this sector is likely reliant on a loosening of the restrictions that inhibit housing and infrastructure development in both the West Bank and Gaza.

Education & Academia

Subject matter experts and key stakeholders did not identify education and academia as a sector likely to offer significant employment opportunities for youth during the COVID-19 recovery. However, a substantial share of respondents to the youth survey were working in the sector a year and a half into the pandemic. In Jordan, 15% of employed respondents were engaged in the sector, including 26% of employed refugee youth and 14% of employed Jordanian youth. Similarly, 13% of employed youth respondents in Palestine were working in education and academia, with equal shares from both Gaza and the West Bank.

Despite the relatively high concentration of surveyed youth working in the sector, survey responses collected from all youth, including those



who were not employed, indicate that youth optimism toward education and academia is relatively low overall. Only 5% of Jordanian youth and 4% of refugee youth surveyed felt that the sector was likely to offer the most job opportunities for young people over the next two years. In Palestine, only 1% of youth in the West Bank felt it would be a promising sector. The exception to this trend was Gaza, where 15% of youth respondents felt that education and academia would be a promising sector for youth employment.

Optimism toward the sector also appears to have a gender component. Across Palestine, young women were nearly three times more likely than young men to believe that the education and academia sector was likely to offer the most job opportunities for young people over the next two years (15% compared to 6%).

Although overall youth optimism toward the sector was low, the potential for education and academia to generate employment opportunities for youth is explored here for the following reasons: the significant share of surveyed youth who were employed in the sector, the optimism about the sector among young women and youth in Gaza, and current supportive government initiatives in the field.

Education & Academia in Jordan

Potential for employment opportunities in education and academia in Jordan exist across the sector, from early childhood through higher education. The GoJ places a great deal of importance on quality education, with 12.2% of Jordan's government budget earmarked for education expenses, and the proportion of government spending growing in alignment with GDP.¹⁸¹ Funding for the education sector is expected to continue to grow as the GoJ aims to increase the number of international students at public universities from

fewer than 40,000 to more than 70,000 students annually.¹⁸² In 2014, the formal education sector employed more than 116,000 teachers, with more than 68% working at public institutions.¹⁸³

In the Education Strategic Plan (2018-2022), the Jordanian Ministry of Education (MoE) recognized the relative weakness of the qualifying and career progression systems for teachers and education leaders. One of the plan's strategic objectives is to foster qualified educators for the system, beginning at early childhood education. In past years, the MoE has offered special exemptions to allow community college graduates to fill educational vacancies, along with professional learning programs for subject-specific areas. Given the particular need for educators in rural areas, the MoE has even offered additional stipends to encourage employment in the education sector in these regions.¹⁸⁴

Early childhood education (ECE), inclusive of nursery and two years of kindergarten (KG1 and KG2), is recognized by the MoE as a priority area for improvement. While ECE is not currently compulsory for all children, the GoJ is shifting toward a mandatory year of KG2.¹⁸⁵ In addition, enrollment in early childhood programs is on the rise, increasing from 24.7% in 2016 to 31.5% in 2020.¹⁸⁶ Given the prospective government requirement, increasing demand for ECE programs, and growing numbers of working mothers, ECE programs – both public and private – are likely to see an increased need for qualified educators.¹⁸⁷

Similarly, with more than 1.5 million students enrolled in basic and secondary education, Jordan has seen a rise in the need for double shift classes to enable refugees to attend school in addition to Jordanian children.¹⁸⁸ As the number of students rises, Jordan will need to hire more teachers to maintain current pupil to teacher ratios.



More than 335,000 students enrolled in Jordanian universities during the 2020-2021 school year, the vast majority of whom attended the country's ten public schools, along with more than 34,000 students who enrolled in community colleges. To meet the needs of these high enrollment numbers, 11,394 faculty members are currently employed in Jordan, including 8,011 at public schools and 3,383 at private universities.¹⁸⁹

Jordan's Higher Education Council has recently approved the discontinuation of 13 academic programs in favor of 20 new areas of study that prioritize skills that fulfill local market needs. New programs primarily focus on digitization and technology, including data science, renewable energy, and information security.¹⁹⁰ While this move is considered controversial, the alignment with concrete skillsets that match market needs could provide better employment prospects for graduating youth, as well as opportunities for current employees in these sectors to access jobs in higher education.

Along with the formal education sector, Jordan has seen a significant demand for informal and nonformal education programs.ⁱⁱ The MoE runs six nonformal education programs for both children and youth, ranging from home study to adult literacy, as well as others.¹⁹¹ The United States Agency for International Development (USAID) has also supported the development of the nonformal education sector in Jordan, establishing 43 nonformal learning centers in the country since 2007.¹⁹² These are further supplemented by privately run nonformal learning programs, such as the youth workforce development programs offered by organizations including EFE-Jordan.

Finally, the shift toward distance learning and digital-based education has altered the realities of the education and academia sector over the past few years. Even prior to the COVID-19 pandemic, the GoJ began to implement online learning programs, such as the Darsak platform, providing free distance learning for Jordanian youth alongside public school curricula. The pandemic accelerated the development and implementation of such online tools, though issues of teacher capacity and infrastructure challenges are still common.¹⁹³

Education & Academia in Palestine

In Palestine, the Ministry of Education and Higher Education (MoEHE) oversees preschool, basic, secondary, technical and vocational, nonformal, and higher education. Enrollment in pre-primary education has increased over the past decade, rising from 41.5% in 2011 to 58.1% in 2020. Enrollment rates are high for basic and secondary education, with 96.4% and 91% of school-aged children enrolled, respectively. However, despite growth in preprimary, basic, and secondary education, enrollment in higher education has been

Potential for employment opportunities in education and academia in Jordan exist across the sector, from early childhood through higher education

ii According to the IBE Glossary of Curriculum Terminology, nonformal education refers to programming that is provided to complement or as an alternative to formal education pathways. It can run parallel to formal education structures for adult learners or out-of-school youth, or can provide life and work skills not addressed in formal education programs. Nonformal education can, but does not necessarily, result in formal qualifications or certifications. Informal education refers to less structured programs that generally do not result in formal certification. Informal education can take place in the workplace, at home, or in the community.



in a slow but steady decline since 2011, with 43.1% of relevant youth enrolled in 2020, down from 49.7% in 2011.¹⁹⁴

In the Education Sector Strategic Plan (2017-2022), the MoEHE has identified numerous strategic objectives to advance the education system, while also identifying challenges that inhibit its ability to realize these goals. The plan states that 100 new schools will need to be built and staffed with new teachers by 2030 to meet the increasing demand for formal education in alignment with population growth. There is a need for more qualified teachers across grade levels, though funding shortfalls could create challenges to meeting this need. Palestine is dependent upon external donors and partners to cover much of the cost of its teaching workforce. UNRWA, for example, oversees 12% of schools in Palestine, as well as schools that serve Palestinian refugees in Lebanon, Jordan, and Syria.¹⁹⁵

The Palestinian Education Sector Strategic Plan states that 100 new schools will need to be built and staffed with new teachers by 2030 to meet the increasing demand for formal education in alignment with population growth

The MoEHE is supported by partners not only in the implementation of formal learning structures, but also in providing nonformal and informal learning opportunities to students who have dropped out or previously lacked access to for-

mal systems. The MoEHE oversees a program for these students, in addition to adult literacy programs for those over the age of 15. Other partners working in nonformal and informal education include UNESCO, Amideast, the German Institute for Adult Education, UNICEF, and more.¹⁹⁶

In addition to focusing on teacher qualifications, the MoEHE envisions prioritizing curricula updates and reform, as well as developing online learning programs to advance education in Palestine. However, funding shortfalls constitute a barrier for the development of these areas, and infrastructure limitations create challenges to ensuring equitable learning opportunities for online programs.¹⁹⁷

Potential for Youth Employment in Education & Academia

As the demand for quality education grows in Jordan, the GoJ has plans to build new schools, hire qualified teachers, and provide additional training and professional learning opportunities for educators across education types and grade levels.¹⁹⁸ The GoJ is committed to updating content and further developing distance and online learning. These advancements in the education and academia sector present significant opportunities for job creation, some of which could benefit young job seekers wishing to work in the field. Job types that may expand within education and academia in the coming years could include early childhood educators, primary and secondary school teachers, higher education professors, informal trainers, curriculum developers, and IT workers specializing in education technology.

Similarly, in Palestine, the potential for youth engagement in the education and academia sector exists along both traditional and nontraditional routes, though limitations in securing necessary funding and investments remains a challenge, as



noted above. As early childhood education grows, the need for ECE teachers and teaching assistants will also increase. The MoEHE has also prioritized the provision of counseling services to their students, signaling the potential for an expansion in job opportunities for counseling staff and related positions.

Opportunities also exist in aligned professions. For example, the MoEHE would like to utilize locally developed toys and learning materials for preschools, signaling the possibility for employment in creating learning tools. Online learning is also of interest in the formal education system, but the status of relevant infrastructure indicates that jobs in the industry are probably further off.

Youth workforce development organizations could support sector development by providing training focused on skills for educators and related staff that the Jordanian MoE and the Palestinian MoEHE are not currently providing. Programming focusing on the development and curation of education technology, early childhood development practices, and both nonformal and informal market-informed programming are all promising areas for growth.

Healthcare

Subject matter experts and local stakeholders in both Jordan and Palestine noted that healthcare was one of the sectors that has fared best throughout the pandemic, as there has been an unprecedented increase in demand for medical services. Both Jordan and Palestine face shortages in qualified medical personnel across a number of skill levels, job profiles, and specialties. In Jordan, medical personnel are most needed in public sector facilities, and there are regional imbalances in staffing throughout the country. The Palestinian healthcare sector faces a number of systemic challenges leading to chronic shortages

of personnel and equipment in both the West Bank and Gaza.

Among employed youth surveyed for this study, 8% in Jordan were working in medical/health services a year and a half into the pandemic, compared to 20% in Palestine. Within Palestine, 31% of employed youth in the West Bank were working in the sector, as were 15% in Gaza. In addition, 1% of employed youth in Jordan were working in the pharmaceutical sector, as were 1% of employed youth in Palestine, all of whom were in Gaza. In Jordan, refugees are legally prohibited from working in healthcare and medical fields, and thus none of the refugee respondents reported working in these sectors.

Youth surveyed in Palestine were nearly three times as likely as those in Jordan to feel that the healthcare sector would offer the most job opportunities for young people over the next two years (15% compared to 6%). Within Jordan, Jordanian youth were significantly more likely than refugee youth to share this belief (7% compared to 1%), which is likely due to the fact that refugees are not permitted to work in the sector. In Palestine, youth in the West Bank were nearly twice as likely as those in Gaza to feel that the

Youth surveyed in Palestine were nearly three times as likely as those in Jordan to feel that the healthcare sector would offer the most job opportunities for young people over the next two years



In Jordan, shortages of medical staff have been a particularly significant problem throughout the pandemic

sector would offer the most job opportunities for youth (25% compared to 13%). In addition, young women were nearly twice as likely as young men to feel that the sector would be promising (17% compared to 9%).

The Healthcare Sector in Jordan

Jordan invests heavily in its healthcare system, which is known to be one of the strongest and most reputable in the MENA region. The healthcare sector employs more than 55,000 Jordanian nationals in mostly high-skilled jobs and accounts for 5% of Jordan's GDP.¹⁹⁹ The GoJ expects the healthcare sector to grow over the coming years due to several factors, including high domestic healthcare spending levels,²⁰⁰ widespread insurance coverage among the Jordanian population, increasing demand due to the growing population of refugees from Syria and other countries, and an expanding medical tourism industry.²⁰¹ The Jordan Investment Commission (JIC) notes that there will be a need for new public and private hospitals and medical centers to meet demand in the coming few years, particularly in the cities of Amman, Zarqa and Irbid, which will create new employment opportunities in a variety of specialties.²⁰²

Medical tourism constitutes a significant source of income for Jordan's healthcare sector, with the country being ranked first in the MENA region and

among the top ten countries in the world in this field. Jordan's National Strategy for the Health Sector from 2015-2019 outlined a number of reasons for Jordan's success in this area, including its highly qualified personnel, high quality medical services, competitive treatment costs, strong health insurance system, advanced medical devices and diagnostic equipment, and availability of hospital resorts such as the Dead Sea and Ma'ain Spa.²⁰³

In 2014, 250,000 patients from countries such as Saudi Arabia and Sudan received treatment in Jordan. Forty percent of Jordan's private hospital revenues were derived from medical tourists that year, reaching JD 1 billion. The Jordan Private Hospitals Association has sought to further expand this industry by launching a marketing campaign for potential patients in Saudi Arabia, Oman, Algeria, Chad, Nigeria, and Kazakhstan.²⁰⁴

Additionally, the Jordan Competitiveness Program, funded by USAID, established a council for medical tourism in order to help expand this industry in Jordan.²⁰⁵ The JIC recommends a number of investments in new facilities and positions in order to accommodate medical tourists, including health spas, wellness centers, physiotherapy, Dead Sea cosmetics, and other areas.²⁰⁶

Despite the promising trajectory of the medical tourism industry in Jordan, a number of experts note that the healthcare sector suffers from a shortage of qualified medical staff, particularly within public medical facilities run by the MoH. While public sector employment is generally prized among the Jordanian workforce, the healthcare sector stands as a key exception. There are significant disparities in salaries and working conditions between publicly and privately run hospitals and medical facilities, leading many qualified personnel to seek employment in the private sector or abroad.²⁰⁷



Jordan's Higher Health Council notes that several medical specialties face a shortage of trained practitioners, including psychology, family medicine, anesthesia, neurosurgery, cardiovascular surgery, among others. There are also regional imbalances, with the majority of health workers concentrated in the central region of Jordan around Amman and a scarcity of qualified personnel, particularly doctors, in the rural governorates.²⁰⁸

The influx of Syrian refugees into Jordan over the past decade has put additional pressure on Jordan's healthcare system. The Jordanian Higher Health Council notes that the unprecedented level of demand for healthcare services has, at times, overwhelmed the public health sector and led to competition for scarce human and physical resources, particularly in the northern governorates.²⁰⁹

Additionally, shortages of medical staff have been a particularly significant problem throughout the pandemic. The GoJ has sought to recruit thousands of personnel from backgrounds ranging from new nursing graduates to retired doctors in order to meet the surge of demand.²¹⁰

In order to address staffing and retention concerns, the Jordanian Higher Health Council has called for a national comprehensive plan surrounding the recruitment, appointment, training and development, promotion, and termination of healthcare personnel, including an updated compensation plan, among other policies.²¹¹ The MoH has recently undertaken a number of actions to make employment in public medical facilities more attractive, including announcing a 30% salary increase in all positions and areas of specialization, and offering both financial and non-financial incentives for personnel to work in underserved governorates. However, the Jordan Strategy Forum notes that the level of success of these actions is yet to be seen.²¹²

The healthcare sector in Palestine faces significant shortages of qualified medical personnel and physical resources to meet the needs of the population in the West Bank and Gaza

Pharmaceuticals manufacturing is also a burgeoning industry in Jordan. While it currently employs only about 8,000 people, the Jordan 2025 National Vision and Strategy notes that it is one of the fastest-growing industries in the country and the third-largest export group. The number of Jordanians employed in the pharmaceuticals industry increases by approximately 10% annually, and a number of firms have noted their intention to expand their production in Jordan. The 2025 Strategy also notes that the GoJ hopes to diversify the industry beyond drug manufacturing by launching clinical trial services, biotechnology research, and product development, making pharmaceuticals a promising area for future job growth.²¹³

The Healthcare Sector in Palestine

The PA is responsible for providing health care to the population residing in the West Bank and Gaza, while residents of East Jerusalem have access to Israeli health insurance and medical facilities.²¹⁴ The Palestinian National Institute of Public Health reports that there are 36,809 employees in the Palestinian health sector, 56% of whom work in the West Bank. The majority of health workers in Palestine work in the public sector, with the MoH employing 56% of sector personnel in the



West Bank and 44% in Gaza.²¹⁵

The healthcare sector in Palestine faces significant shortages of qualified medical personnel and physical resources to meet the needs of the populations in the West Bank and Gaza. The ratio of nurses and midwives to the size of the population is far below the recommended levels by the World Health Organization (WHO). In Palestine, there are 1.95 nurses and midwives per one thousand citizens, while the WHO recommends a ratio of at least three per one thousand citizens.²¹⁶

Additionally, in both the West Bank and Gaza, there is a critical shortage of practitioners focusing on a number of medical specialties and diseases, including oncology, blood diseases, kidney disease, neurological surgery, pediatric surgery, and others. The Palestine Economic Policy Research Institute (MAS) reports that uneven distribution of specialists as well as diagnostic and treatment devices across MoH hospitals compounds this issue.²¹⁷

The reasons for the shortage of qualified medical personnel in Palestine are varied, but include challenges within the Palestinian higher education system and issues surrounding the industry accreditation process. First, Palestine has only four medical schools to serve both the West Bank and Gaza.²¹⁸ Existing healthcare personnel, particularly in Gaza, often lack access to the most up-to-date training, and therefore are unable to develop specialized skills or adapt to new advances in medical practice.²¹⁹ Additionally, Palestinian universities in the West Bank and Gaza are unable to effectively collaborate on medical education with those based in East Jerusalem, and there are sometimes accreditation issues between university campuses in different parts of Palestine. Finally, low salaries for healthcare personnel are a significant contributor to “brain drain” in the West Bank and Gaza, as many qualified medical

practitioners who have the opportunity to emigrate choose to do so in order to secure a higher standard of living elsewhere. According to an expert on the Palestinian healthcare sector, an estimated 100-160 doctors and medical professors left Gaza in 2018 for opportunities abroad.²²⁰

The shortage of qualified medical personnel and necessary equipment to treat a number of life-threatening diseases locally leads to the issuance of a large number of referrals for treatment outside of the West Bank and Gaza.²²¹ The number of referrals issued for Palestinians to seek treatment outside of the Palestinian health system rose from 6,052 in 1996 to 109,818 in 2018.²²² Residents of Gaza who need access to treatment in the West Bank, Israel, or other countries are required to obtain permits from the GoI to travel, but securing these approvals can prove challenging.²²³

The pandemic has placed substantial additional pressures on the national health system. The Palestinian National Institute of Public Health reports that up to 25% of residents in the West Bank and Gaza faced barriers in accessing essential health services between May and October 2020 because health facilities were overwhelmed in responding to COVID-19 outbreaks.²²⁴ Additionally, the May 2021 hostilities exacerbated Gaza’s healthcare system challenges, as more than a dozen medical facilities were damaged during the conflict.²²⁵

A number of programs have sought to address staffing shortages in the Palestinian healthcare sector, including the Investment Programme for Resilience (IPR) funded by the Government of Germany and implemented by UNDP, and the World Bank Finance For Jobs (F4J) project.²²⁶ Additionally, the Palestinian MoH has made this issue a central focus of its National Health Strategy for 2017-2022. The fourth objective of this strategy focuses on promoting and developing health work-



force management systems in order to attract qualified personnel who can provide high quality health services. As part of this objective, the MoH is working to develop a national system and strategy for continuing education and professional development linked to licensing and accreditation in a variety of healthcare fields, and is partnering with the private sector and civil society to attract qualified human resources for the sector.²²⁷

MAS has also made a number of recommendations for the sector, including increasing the capacity of medical, dentistry, pharmacy, and nursing faculties at universities in the Gaza Strip and making these faculties in West Bank universities open to students from Gaza. They also recommend that the MoH partner with the MoEHE, the Council of Higher Education, the private sector, and NGOs to develop a long-term strategy to address skills gaps in the Palestinian healthcare workforce.²²⁸

Potential for Youth Employment in the Healthcare Sector

There is significant potential for youth employment in the healthcare sector in both Jordan and Palestine in the coming years. Many of the positions in demand require a high level of skill and education and therefore may not be accessible to the most vulnerable youth populations. Additionally, Syrian refugees are legally barred from working in healthcare and medical fields in Jordan. However, as the healthcare sector grows in Jordan and Palestine and new medical facilities are established, there will also be a need for additional personnel such as nurses' aides and other care professionals, which would provide opportunities for greater numbers of youth.

In Jordan, demand for staffing is highest among public sector medical facilities, particularly those in governorates outside of the main city centers.

Recent actions taken by the Jordanian MoH to address salary disparities between public and private sector health professionals and to provide incentives for working in underserved governorates will hopefully make these positions more attractive for youth seeking employment in the medical field. Additionally, the country's planned expansion efforts in the medical tourism and pharmaceuticals industries are likely to create new jobs in the coming years.

In Palestine, political and economic barriers make the long-term growth and employment prospects in the healthcare sector more difficult to predict. There is a clear need and demand for trained and qualified health professionals across a range of job profiles and specializations in both the West Bank and Gaza. Several organizations are investing in training and employing youth professionals in this sector through programs including the World Bank F4J²²⁹ and the IPR project, funded by the Government of Germany and implemented by UNDP,²³⁰ with positive results.

However, the small number and low enrollment capacity of medical schools in Palestine may limit the number of youth who can pursue careers in healthcare. In addition, hospitals and health centers are likely to continue to face barriers to importing the necessary equipment and state-of-the-art technology to perform high-level medical procedures. Finally, the financial situation of the healthcare sector will likely continue to pose challenges to recruiting and retaining high-quality human resources. As such, while there is a pressing need to develop the sector and increase staffing in order to support public health, progress may be slow to arrive due to the complexity of the challenges facing the sector.

Given these factors, workforce development organizations wishing to train youth to enter the field should coordinate closely with local health-



care providers and the MoH in order to ensure that job opportunities await those who complete programming.

Hospitality, Tourism, and Services

Although hospitality, tourism, and services were the sectors most affected by COVID-19 in Jordan and Palestine, subject matter experts and local stakeholders consulted for this report felt confident that these sectors would experience growth over the next two years and that jobs would return. The sudden cessation of travel and the establishment of lockdowns and social distancing measures imposed during the pandemic had a significant impact on hotels, tourism companies, restaurants, and service-sector businesses including wedding halls, hair salons, and others. Interviewees noted that some restaurants were able to introduce delivery services to continue operating. However, some companies in Jordan that attempted to continue operating during that time found the process outlined for essential workers to obtain movement permits to be unclear.²³¹

Local stakeholders and subject matter experts also noted that they expect other businesses in the entertainment and recreation sectors to grow in Jordan over the coming years, including recreational gyms. In addition, many expect beauty salons and the wedding industry to expand in both Jordan and Palestine.

Although the GoJ, the PA, and private sector federations have an interest in the success of the hospitality, tourism, and the larger service sector and will continue to invest in their growth and resurgence following COVID-19, many interviewees also noted that these sectors will face both external and systemic challenges that may inhibit their growth in the coming years. These include regional volatility and cultural stigmas that discourage service sector employment.

Only a very small portion of the employed youth who responded to the survey conducted under this study were working in the hospitality, tourism, and services sectors a year and a half into the pandemic. This likely reflects the significant impact that COVID-19 had on the sectors in both Jordan and Palestine. In Jordan, only 2% of employed Jordanian youth worked in the tourism and hospitality sectors and 5% worked in the restaurant and cuisine sector. No refugee youth surveyed in Jordan were employed in these sectors, nor were any of the youth surveyed in Palestine.

Youth survey respondents in Jordan were fairly positive about future prospects for opportunities in the restaurant and cuisine sector but were more circumspect about the future of the tourism and hospitality sector

Youth survey respondents in Jordan were fairly positive about future prospects for opportunities in the restaurant and cuisine sector. Among Jordanian youth, 9% felt that the sector would offer the most job opportunities for young people over the next two years, as did 25% of refugee youth. However, youth in Jordan were more circumspect about the future prospects of employment in the tourism and hospitality sector, with only 5% of Jordanian youth and 4% of refugee youth stating that the industry was promising.



In Palestine, youth respondents from both the West Bank and Gaza were significantly less optimistic about the future employment prospects in both the restaurant/cuisine and tourism and hospitality sectors. Only 1% of youth in each the West Bank and Gaza felt that the restaurant/cuisine sector would offer the most job opportunities for young people over the next two years. As for tourism and hospitality, only 1% of youth in Gaza and none of the respondents in the West Bank believed that the sector was promising.

Hospitality, Tourism, and Services in Jordan

Hospitality and tourism are among the largest sectors in Jordan and are major contributors to the Jordanian economy, generating approximately 19.4% of Jordan's GDP in 2017 according to the JIC. The country has a wide range of tourist attractions and offerings, ranging from medical and wellness tourism to cultural tourism, faith pilgrimage tourism, adventure tourism, and tourism aimed at meetings, conventions, and events. Travel and tourism employed more than 51,000 people in 2017, accounting for 4.9% of Jordan's labor force.²³²

The hospitality, tourism, and services sectors were heavily impacted by the pandemic. Periods of lockdowns and curfews led to the closure of almost all restaurants, hotels, salons, recreational gyms, and other service sector businesses during the spring of 2020, and when they were allowed to reopen in June 2020, strict social distancing and hygiene requirements increased operational costs and limited business.²³³ Tourist arrivals declined by 39% in 2020 with the onset of the pandemic, partly due to border closures,²³⁴ though they have rebounded somewhat with the easing of travel restrictions beginning in August 2020.

The GoJ has invested heavily in the hospitality and tourism sectors and in specific projects that will

grow substantially over the next decade. The GoJ's EPP lists tourism as a priority sector and sets a target of attracting 4.5 million tourists to Jordan by 2023.²³⁵ The EPP sets a return to pre-pandemic tourism levels as an initial goal.

The Jordanian tourism industry began efforts to revitalize the sector by promoting domestic tourism throughout the summer of 2021, launching the "Urdun Jannah" program, which encouraged Jordanians who might otherwise have traveled internationally to visit Jordanian cultural, archeological, and beach destinations including Aqaba, Wadi Rum, Petra, the Dead Sea, and Jerash. According to the Jordanian Ministry of Tourism, the program offered free bus transport to drive Jordanians to domestic tourism sites, among other incentives, and engaged approximately 106,900 domestic tourists between April through October 2021.²³⁶

Another key element of the Jordan EPP strategy to drive tourism is to enhance access to Jordan by forming agreements with international low-cost airlines. Early efforts in this area have focused on European airlines, including the Swiss company easyJet and Irish airline Ryanair, but the Jordan Tourism Board has also noted that it aims to target tourists from China and India in the future, in addition to Europe, the United States, Canada, and Arab Gulf countries.²³⁷

Along with the expected gradual resurgence of the tourism sector, industry stakeholders in Jordan noted that they expect substantial job creation in the restaurant and hotel industries in the coming years, especially among fast casual restaurants. A local industry representative noted that some of the trends accelerated by COVID-19, including an increase in "ghost kitchens" offering only food delivery services, may continue as consumers have become more digitally engaged.²³⁸ Local stakeholders also noted that they expect a



This services sector employed 73.5% of working Palestinian women in the lead up to the pandemic

resurgence in demand for other services including beauty salons, recreational gyms, and companies related to the wedding industry, and they projected growth in these industries over the medium- to long-term.

Hospitality, Tourism, and Services in Palestine

The service sector in Palestine, encompassing hospitality, tourism, restaurant/cuisine and other related industries has formed a significant source of employment for much of the Palestinian population, especially women. According to the Labor Sector Strategy (2021-2023) produced by the Palestinian MoL, approximately 35.7% of Palestinian workers were employed in the sector during the fourth quarter of 2019. The service sector also employed 73.5% of working Palestinian women in the lead up to the pandemic.²³⁹

The tourism sector has been a particularly critical contributor to the Palestinian economy both in terms of employment and government revenues. PCBS notes that more than 43,000 Palestinians were employed in the tourism sector in 2019, and many of these workers lost their jobs in 2020 due to lockdowns and a general slowing of the international travel and tourism industry during the pandemic. PCBS and the Palestinian Ministry of Tourism and Antiquities (MoTA) estimate tourism sector losses at approximately USD 1.15 billion be-

tween March to December 2021, most significantly affecting the cities of Bethlehem and East Jerusalem, which receive approximately 81% of all tourists.²⁴⁰ These losses have had devastating implications on Palestinian GDP and foreign exchange reserves, and have also caused challenges for companies in the tourism sector to repay debts associated with large-scale investments they had made in recent years.²⁴¹

While the majority of jobs in the hospitality, tourism, and the wider service sector were concentrated in the West Bank and East Jerusalem, these industries also sustained significant losses in Gaza. Following the start of the pandemic, a number of hotels in Gaza were converted into quarantine centers for Palestinians returning to Gaza. This action, coupled with social distancing guidelines, prevented hotels from hosting weddings, parties, and other events that make up a large proportion of their revenue.²⁴²

The PA has taken a number of actions to support the recovery of the hospitality and tourism sector. In late May 2020, the PA formed a Tourism Recovery Taskforce, which included representatives from the MoTA, the Arab Hotel Association, the Holy Land Incoming Tour Operators Association, the Palestinian Society of Tourist and Travel Agents, the Guide Union, and the Network of Experimental Palestinian Tourism Organizations. The Taskforce rolled out standards and protocols in June 2020 aiming to allow the Palestinian tourism sector to fully reopen to international visitors.²⁴³ Among the initiatives of the taskforce was Jahzeen.ps, an e-learning platform focused on COVID-19 prevention standards and protocols that aimed to support a resilient tourism sector recovery.²⁴⁴ The MoTA also launched a campaign specifically to promote tourism in Bethlehem in November 2021, called “Bethlehem, in a different light.”²⁴⁵ In addition, the German government and EU have also provided financial support for the



recovery of the tourism sector, including launching the East Jerusalem Tourism Development Programme in October 2021.²⁴⁶

The efforts to revitalize the Palestinian tourism industry demonstrated modest successes in 2021, as PCBS reported an 18% increase in the number of employees working in tourism activities during the second quarter of 2021 compared to the same period of 2020. While the number of inbound tourists during the first half of 2021 continued to be depressed compared to both 2019 and 2020, Palestine did witness a slight improvement in the number of domestic tourists in 2021 in relation to the previous year.²⁴⁷

Potential for Youth Employment in Hospitality, Tourism, and Service Sectors

Hospitality, tourism, and the wider service sector are likely to begin hiring increasing numbers of employees in both Jordan and Palestine as businesses continue to reopen with the cessation of COVID-19 restrictions. The sectors benefit from strategic prioritization by both the Jordanian and Palestinian governments as well as significant investment by international funders. However, there are a number of factors that may prevent these sectors from quickly rebounding to pre-pandemic levels of employment and that could pose challenges to their longer-term growth.

Most critically, international tourism worldwide has not fully rebounded due to health and safety concerns regarding COVID-19 among prospective tourists, in addition to shifting regulations surrounding international travel and border control in light of new variants. Despite significant efforts by the Jordanian and Palestinian tourism industries to adapt to COVID-19, it will likely take time for visitor numbers to rebound to pre-pandemic levels, especially given the uncertainty surrounding the spread of new variants.

Despite these challenges, the hospitality and tourism sector in Jordan is well-positioned to rebound during the COVID-19 recovery given the strong focus of the GoJ on its success, coupled with ongoing investment from international funders including the European Bank for Reconstruction and Development (EBRD) and USAID. A study by the Glasgow Consulting Group supports the notion that the Jordanian tourism sector will rebound, projecting that international tourist arrivals will reach 3.5 million by 2025.²⁴⁸ Loosened social distancing regulations and the elimination of evening and weekend curfews in Jordan are also likely to have a positive impact on growth in other service sector jobs, including positions in restaurants, beauty salons, wedding and event venues, and recreational gyms.

Notably, the service sector offers promising employment opportunities for vulnerable Jordanians, as many jobs do not require a university degree. However, the sector has faced challenges in recruiting and retaining employees due to systemic and cultural issues unrelated to COVID-19, including low wages, high transportation costs, and social stigmas and norms discouraging employment in service jobs, particularly for women. Syrian refugees are also restricted from obtaining work permits for certain jobs in the tourism and hospitality sector.²⁴⁹ These challenges pre-dated the onset of the pandemic and are likely to continue to pose barriers to its growth in the coming years.

In Palestine, international tourism is also likely to resurge following the pandemic given the number of significant religious sites in the West Bank and East Jerusalem. However, the political situation may continue to hamper large-scale growth of this sector. A 2019 World Bank report cited political instability as a key barrier to the job creation potential of the tourism sector, noting that while there could be some progress in establishing in-



ternational tourist circuits with Jordan, Egypt, Lebanon and Israel that would result in modest increases in tourist numbers and associated jobs, safety concerns will likely make it difficult to draw large numbers of tourists to the West Bank.²⁵⁰ As such, workforce development organizations wishing to train youth in tourism and hospitality should closely monitor developments in the sector to ensure that participants are likely to secure employment upon program completion.

Additionally, other service sector jobs in Palestine will likely continue to grow as a result of local consumption with the relaxation of pandemic restrictions. These include jobs in restaurants, beauty salons, wedding and event venues, recreational gyms, and other facilities.

Manufacturing

Subject matter experts and key stakeholders identified manufacturing and factory production, under the larger scope of the industrial sector, as promising for youth employment in both Jordan and Palestine. A significant share of employed respondents to the youth survey conducted under this study were working in the sector a year and a half into the pandemic. In Jordan, 14% of employed Jordanian youth were working in factory production, as were 26% of employed refugee youth. Employment in factory production was less common in Palestine, with 9% of employed youth in the West Bank and 5% in Gaza working in the sector. As with other sectors of employment among youth surveyed under this study, the share of youth employed in factory production is partly a function of the sectors upon which EFE trainings focused during the sample period. EFE-Jordan completed a significant number of trainings during the sample period that were focused on factory production.

While government authorities in both countries

identified manufacturing as a priority sector for growth, youth perceptions of employment opportunities in the field differed by location and population. In Jordan, 18% of Jordanian youth and 26% of refugee youth surveyed felt that factory production would offer the most job opportunities for young people over the next two years. In Palestine, youth perception around opportunities varied significantly by location. Surveyed youth in the West Bank were nearly five times as likely as those in Gaza to feel that factory production would offer the most job opportunities for young people over the next two years (14% compared to 3%).

Manufacturing in Jordan

The GoJ has identified the industrial sector as a priority for support and growth within the EPP. As a significant subsection of the industrial sector, manufacturing is a critical component of the Jordanian economy, accounting for 25% of the country's GDP. This figure increases to 40% when close linkages to other economic sectors are considered. More than 250,000 individuals work in the industrial sector in Jordan, comprising 21% of the country's workforce.²⁵¹

Surveyed youth in the West Bank were nearly five times as likely as those in Gaza to feel that factory production would offer the most job opportunities for young people over the next two years



Manufacturing in Jordan is comprised of subsectors supplying resources across a diverse set of sectors, including the production of garments, wood and furniture, leather and textiles, chemicals and cosmetics, plastics and rubber, manufacturing for construction purposes, handicrafts, and medical and pharmaceutical supplies.²⁵² Manufacturing represents a promising source of employment opportunities in Jordan given GoJ prioritization of the sector in addition to the wide variety of opportunities it offers for individuals with different skill levels.²⁵³

More than 250,000 individuals work in the industrial sector in Jordan, comprising 21% of the country's workforce

The manufacturing of garments and leather constitutes approximately 20% of industrial exports from Jordan and 27% of exports from the manufacturing sector.²⁵⁴ In 2019, garment manufacturing provided more than 70,000 formal jobs in 89 factories. However, approximately 75% of employees in these factories were migrant workers.²⁵⁵

The significant contribution that garment manufacturing now makes to the Jordanian economy partly dates to the creation of Qualified Industrial Zones (QIZs) and free trade agreements (FTAs) with the United States. In 1996, recognizing the potential for job creation and economic prosperity driven by the manufacturing sector, Jordan signed an agreement with the United States that allowed for garments made in QIZs to be exported to the United States duty-free. Subsequently, in

2010, the Jordan FTA was signed, which allowed for a continuation of duty- and quota-free exportation to the United States.

The preferential treatment created by these agreements significantly increased garment exports from Jordan, which rose from \$42 million in 2000 to \$1.25 billion in 2006. The industry slowed with the recession in 2009, along with the publication of several exposés that uncovered significant labor violations within the sector. In response, Jordan was put on the Forced Labor List of the US Department of Labor but was subsequently removed from the list in 2016 after taking concrete steps to improve conditions.²⁵⁶

In 2009, the GoJ began the establishment of satellite units in the garment manufacturing industry to provide opportunities for the employment of women and workers in rural areas and to address the other known challenges that the industry was facing. These small-scale factories were required to ensure that 25% of their employees were Jordanian, increasing to 30% by 2018 and 50% by 2021. As of 2019, 5,500 employees were working in satellite factories, 4,700 of whom were women. While these smaller manufacturing units address the challenges of access to work for rural workers, especially women, they have yet to prove profitable, with most either breaking even or losing money due to management challenges, insufficient standardization of work practices, limited investment in the workforce, and a lack of worker incentive programs.²⁵⁷

While the manufacturing and export of textiles and leather goods in Jordan decreased following the start of the pandemic, the manufacturing of pharmaceuticals and medical supplies experienced significant growth.²⁵⁸ As of 2018, Jordan had 108 domestic factories that exported to 60 countries and created jobs for approximately 8,000 individuals across administrative and technical skill



levels.²⁵⁹ In 2020, these numbers grew to 180 operational factories exporting to more than 90 countries and contributing 2% to the country's GDP. The pandemic supported the success of the manufacturing sector, as Jordanian factories manufactured as many as 5 million facemasks per day, and produced ventilators, personal protective equipment, and other medical equipment necessary to combat the pandemic.²⁶⁰

In addition, the manufacturing of chemicals and cosmetics accounts for almost 20% of Jordan's exports, in the amount of \$1.5 billion as of 2018. Inclusive of fertilizer, inorganic chemicals, detergents and disinfectants, perfumes, cosmetics, and Dead Sea products, this sector experienced significant shifts in priorities and growth since the start of the pandemic. Detergent and disinfectant factories continued to operate during pandemic closures, with a shift to the production of personal use products. Exports remained highly in demand, as did fertilizers and pesticides. Production of chemicals linked to the construction sector, such as dyes, paints, and inks, declined during the pandemic as construction slowed. Similarly, production and sales of perfumes, cosmetics, and Dead Sea products, which are dependent upon the tourism industry, dropped by 95%.²⁶¹

Manufacturing in Palestine

Similar to the GoJ, the PA has identified the industrial sector as a priority within its National Policy Agenda.²⁶² The Palestinian industrial sector is inclusive of manufacturing linked to multiple sectors, such as the production of ceramic and glass, pharmaceuticals, clothing and textiles, and food products. In 2018, manufacturing accounted for 11% of Palestine's GDP.²⁶³ However, despite the PA's prioritization of the sector, the industrial sector has been in decline, and youth participation in the industrial workforce has been low.²⁶⁴

While the manufacturing and export of textiles and leather goods in Jordan decreased following the start of the pandemic, the manufacturing of pharmaceuticals and medical supplies experienced significant growth

The relatively small size of the Palestinian market requires access to foreign trade to support economic growth. However, the development of the manufacturing sector in Palestine is limited due to restrictions in the movement of goods and people, as well as dual use restrictions. As noted previously, the GoI has imposed dual use restrictions that limit the import of goods into Palestine that it deems as having the potential to be used for military purposes alongside their intended civilian uses. Such goods include a variety of chemicals, metals, machinery, tools, and more that are critical for running efficient manufacturing operations and modernizing product lines. For example, nitric acid is typically used in dairy manufacturing as a sterilizing agent for equipment. However, dual use restrictions prevent the import of this chemical, so Palestinian dairy manufacturers typically use phosphoric acid in its place, which is less effective and significantly increases their energy costs.²⁶⁵

The manufacturing industry in Palestine is further limited by the cost and time needed to import and export goods through Israeli-controlled ports and checkpoints. Long wait times, transportation



expenses, storage fees, and security inspection delays and costs directly increase the overall cost of producing and selling manufactured goods. Along with limitations relating to dual use goods, these fees and movement restrictions prevent the manufacturing sector in Palestine from reaching its full productive capacity.²⁶⁶

In addition to these challenges, continued instability and conflict have had further detrimental effects on the Palestinian manufacturing sector. For example, the May 2021 hostilities resulted in damage or destruction to an estimated 50 factories in Gaza.²⁶⁷

In light of the instability of the economic situation, domestic and foreign investors have been hesitant to invest in Palestine, which has further hindered growth in the manufacturing sector.²⁶⁸ Comprising only 1% of the Palestinian GDP, FDI is markedly low in comparison to economies that are growing.²⁶⁹ The share of FDI destined for the industrial sector is also low, reaching only 3.5% in 2020.²⁷⁰ Attracting FDI is particularly challenging within the industrial sector in Palestine given the small average firm size. Among firms in the sector, 91.7% have fewer than nine employees.²⁷¹ However, as Palestine begins its economic recovery as the pandemic wanes, some are pointing to light manufacturing as a promising sector for FDI.²⁷²

Potential for Youth Employment in Manufacturing

The manufacturing sector has the potential to provide a significant number of job opportunities for young people in Jordan. The ILO sees manufacturing in garment, textiles, chemicals, and cosmetics as having the potential to create jobs in the country, including for refugees and Jordanian women.²⁷³ While they have yet to become profitable, satellite factories have begun to provide greater access to employment in manufacturing

to rural workers, especially women.²⁷⁴

In addition, in alignment with growth in the renewable energy industry, the JIC sees potential for investment and resulting job opportunities in the manufacturing of equipment for renewable energy. As Jordan invests in wind power, for example, there is potential for growth in the manufacturing of generators, turbines, and wind blades.²⁷⁵

Challenges remain, however, in matching job opportunities in manufacturing with young job seekers in Jordan. There is a lack of awareness of job opportunities in the sector, available transportation to work sites, and childcare facilities. In addition, mutually unfavorable perceptions exist between employers and both Jordanian and Syrian workers in the manufacturing industry. Employers have traditionally preferred to hire workers from South Asia, who are seen as more committed and skilled. Simultaneously, Jordanian youth perceive manufacturing jobs as unappealing and culturally inappropriate, with a risk of sexual harassment or assault.²⁷⁶ As such, success in increasing the integration of Jordanian and Syrian youth in the sector will require close coordination with youth and factory management to build trust and ensure positive employment outcomes for young people.

Workforce development organizations have the potential to support the adoption of best practices in human resource management in the manufacturing sector in Jordan as the GoJ continues to invest in satellite factories. Given that the formation of these satellite units is relatively recent, there are opportunities to establish high standards as the system is being built. In addition to human resource management, small-scale satellite factories could benefit from capacity building around management and efficiency, as well as in establishing strong incentive programs to support employee retention. The inclusion of training in professional norms and approaches to prevent



sexual harassment in the workplace should be prioritized to support the integration of women in the manufacturing workforce.

In Palestine, the potential for youth employment in manufacturing continues to be limited by the challenges outlined above, including restrictions on the movement of goods and people, dual use restrictions, and others. While the PA has prioritized further development of the sector, including highlighting the need to attract greater domestic and foreign investment, the potential for earning a decent wage in manufacturing remains a challenge, which has led many Palestinians in the West Bank to turn to work in Israeli industrial zones.²⁷⁷

Given these limitations, workforce development organizations wishing to deliver programming in the manufacturing sector in Palestine should coordinate closely with specific factories that are planning to hire a significant number of new employees at one time. This approach can ensure that youth who are trained to work in the sector will find employment following training completion, and can ensure that they are equipped with the specific skills that the factory seeks.

In addition, there is likely greater potential to support youth in entering the sector in the West Bank considering the heightened limitations facing manufacturing in the Gaza Strip. As with factories in Jordan, there is potential for workforce development organizations to support manufacturing firms in creating employee incentive programming and professional growth tracks that have the potential to engage and retain greater numbers of young people.

Renewable Energy

Key stakeholders and subject matter experts consulted for this study identified renewable energy as a promising industry for employment in Jordan and Palestine. However, results of the youth

Although youth survey respondents did not specifically identify renewable energy as a promising industry, they foresee opportunities in sectors that would likely grow with its expansion

survey suggest that young people are not highly focused on the industry as a potential source of jobs. None of the youth survey respondents indicated that they believed the industry would be likely to provide the most job opportunities for young people over the next two years, although a small share felt that the power/utilities sector would be promising more broadly. Among surveyed youth in Jordan, 3% of Jordanian youth and 2% of refugee youth felt that power/utilities would offer the most opportunities for young people over the next two years. In Palestine, the power/utilities sector was mentioned by only 0.5% of youth in Gaza and none in the West Bank.

However, the manufacturing sector will be critical for the development of materials for renewable energy collection and distribution, and the advertising and marketing sector will see opportunities for growth through promotion of the new industry. A larger share of youth survey respondents anticipated opportunities in factory production compared to the power/utilities sector. In total, 18% of Jordanian youth and 26% of refugee youth in Jordan identified factory production as promising, as did 14% of youth in the West Bank and 3% in Gaza.



A large share also felt that the advertising and marketing sector would be promising, including 32% of Jordanian youth and 25% of refugee youth in Jordan, as well as 43% of youth in the West Bank and 53% in Gaza. As such, although youth did not specifically identify renewable energy as a promising industry, they foresee opportunities in sectors that would likely grow with its expansion.

A year and a half into the pandemic, none of the employed youth who were surveyed indicated that they were working in renewable energy. However, 1% of employed youth in Gaza were working in the power/utilities sector. As outlined in previous sections, larger shares were working in factory production and advertising/marketing/PR. In addition, a small share of employed youth was engaged in engineering, which is a complementary field to renewable energy. Four percent of employed Jordanian youth were working in this field, as were 3% of employed youth in Gaza.

Renewables in Jordan

Jordan has significant potential to drive economic growth and job creation through the renewable energy industry and to leverage it to stimulate economic recovery from the pandemic.²⁷⁸ Inclusive of solar, wind, hydro, and biogas energies, the country's climate, skilled labor force, and technological capacity make Jordan ideally suited to pursue renewable energy. The GoJ has prioritized the development of the industry, motivated by its potential to support sustainable economic development, energy security, and the environment. As of 2017, Jordan imported 96% of its fuel and energy,²⁷⁹ making a transition to domestically sourced renewable energy advantageous for increasing the country's energy security.

Following the adoption of the country's initial National Energy Strategy (2007-2020), the GoJ began to pursue renewables in earnest. In a study carried out by the International Renewable Energy

Agency (IRENA), in collaboration with the ILO and the Jordanian Ministry of Energy and Mineral Resources (MEMR), IRENA recognized Jordan as a leader in renewable energy in the MENA region due to its rapid development of the industry and implementation of needed regulatory frameworks. As of 2019, 13% of the country's electricity was generated from renewables, up significantly from the 0.7% generated from renewables in 2014.²⁸⁰

The GoJ has redoubled its commitment to the development of the renewable energy industry in its Strategy for the Energy Sector (2020-2030). Following the relative success of the initial energy plan, the GoJ aims to continue increasing the country's use of renewables, setting a target of 31% of total power generation and 14% of the country's total energy mix to come from renewable sources by 2030.²⁸¹

Solar and wind energy are currently being explored to advance the country's renewable energy goals while boosting economic growth and job creation. In 2018, the Tafila Wind Farm opened in Jordan, the first of its kind in the Middle East.²⁸² Jordan now has three wind farms located in Tafila, Ibrahimyah, and Hofa.²⁸³ Regarding solar energy, Jordan benefits from more than 300 sunny days per year, one of the highest rates globally.²⁸⁴ In November 2021, Jordan signed an agreement with Israel to exchange solar energy for desalinated water, in the largest ever partnership of its type between two nations. This collaboration is projected to accelerate the transition to renewable energy and support both countries in meeting their commitments to the Paris Climate Accords.²⁸⁵

Despite the notable potential for development of renewable energy in Jordan, some challenges will need to be overcome to support the continued growth of the industry. As a relatively new industry, investment in renewables faces challenges in coordination and consistent governance. In



addition, significant levels of investment will be needed to stimulate the industry, with the cost of initial infrastructure required being sizable. The GoJ has historically relied on private investment along with tax exemptions to incentivize the creation of public-private partnerships (PPPs) in renewable energy. Currently, industrial renewable energy projects receive a two-year income tax exemption, along with a lifetime property tax exemption.²⁸⁶

Renewables in Palestine

The development of the renewable energy industry in Palestine would have positive impacts for employment generation and industrialization in both the West Bank and Gaza. The Palestinian Investment Promotion Agency (PIPA), affiliated with the PA, has designated renewable energy as a priority industry for development.²⁸⁷ Historically, Palestine has depended on Israel for energy resources, from which it imports as much as 86% of its electricity.²⁸⁸ The cost of importing energy is high, leading electricity costs in Palestine to rate as the highest in the MENA region.²⁸⁹ Even with the import of energy from Israel, and to a lesser extent, Jordan and Egypt, parts of Gaza continue to face a shortage of electricity as well as rolling blackouts.²⁹⁰

Within this context, the demand for reliable energy has continued to rise in Palestine in step with population growth, increased living standards, and industrialization. It has been noted that limitations in access to affordable and reliable energy sources in Palestine have been a hindrance for growth and increased rates of employment.²⁹¹ As such, the development of renewable energy resources could be beneficial to the population.

Similar to Jordan, both the West Bank and Gaza enjoy approximately 320 days of sun per year, creating ideal conditions to harvest solar energy.

Despite the challenges Palestine faces in implementing renewable energy projects, several small-scale solar programs have been launched in both Gaza and the West Bank

However, limitations on Palestinian autonomy, including restrictions on the movement of goods, inhibit the potential for renewable energy programs to be effectively implemented at a large scale.²⁹² The Palestinian market is relatively small, and the PA is restricted from engaging in open trade in electricity with outside countries. In addition, in the Israeli-controlled areas of the West Bank, Israeli authorities have not granted licenses for the use of land for solar energy.²⁹³ The separation of Palestinian territories also limits the ability to move energy generated by renewable sources across Palestine itself.²⁹⁴

Despite the challenges Palestine faces in implementing renewable energy projects, several small-scale solar programs have been launched in both Gaza and the West Bank. In 2021, the World Bank funded a four-year grant to install solar roofs on 400 schools in Palestine under its F4J project. In addition to providing solar power for schools, the project will employ approximately 600 Palestinians, 60% of whom will be youth, and around a quarter of whom will be women. As the largest electricity-generating project of its kind, F4J will significantly advance job growth and training in the renewable energy industry in Palestine.²⁹⁵ Similarly, a program for women at the Gaza Training Centre, funded by the Government of Germany, trained 98 Gazan women on the in-



stallation, operation, maintenance, and programming of solar photovoltaic systems.²⁹⁶

The Palestine CleanTech Innovation Program was also launched in 2021, in collaboration with the United Nations Industrial Development Organization (UNIDO) in Palestine, the European Union Representative Office in Jerusalem (EUREP), MONE, and Palestine Energy and Natural Resources. This program offers support to 90 startups and entrepreneurs working in clean and renewable energy. The project provides a network of physical hubs, market exposure, and an annual competition for projects and solutions.²⁹⁷

Potential for Youth Employment in Renewable Energy

In order to achieve the goals outlined in its Strategy for the Energy Sector, the GoJ will need to strengthen ties with complementary sectors and increase its capacity to train and employ a workforce in renewable energy. More than 600 companies operate in the renewable energy industry in Jordan,²⁹⁸ and the industry employs approximately 5,000 individuals: 2,000 in photovoltaics, 2,000 in wind power, and 1,000 in solar thermal.²⁹⁹ Potential job opportunities in the industry include manufacturing for renewable energy, as well as operations and management, design, engineering, and financial services. Through collaborations with training institutions and universities, Jordan has the potential to leverage its skilled workforce to achieve higher employment rates, economic growth, and advancements in renewable energy.³⁰⁰

Women currently account for only 16% of Jordan's workforce in clean technology and renewable energy,³⁰¹ pointing to a need to increase gender inclusion in the industry. IRENA has emphasized the necessity of collaborating with universities and training centers to promote a gender-equal

workforce.³⁰²

Palestine faces a more uncertain path toward creating youth employment opportunities in renewable energy given the significant limitations affecting the import and installation of renewable energy systems.³⁰³ Palestine also faces limitations in accessing the needed finance, technology, and research to drive renewable energy programs, and there are limited infrastructure and electricity networks to transmit energy created by renewables.³⁰⁴

However, opportunities in Palestine exist for small- and micro-sized renewable energy projects, including support for entrepreneurs operating within the renewable energy industry, such as in the Palestine CleanTech Program. Yet, the relatively small size of these support programs and the challenges to the sector's growth, outlined above, limit the potential to expand youth employment opportunities in renewable energy at a large scale. As such, youth workforce development organizations may wish to focus efforts on supporting small and microenterprises in the industry, as well as self-employment activities.

Given the relatively low percentage of women in the renewable energy workforce, organizations could help to foster a more gender-equal workforce in the industry by targeting outreach to potential female employees



Job opportunities in renewables span multiple industries, from engineering to HVAC to advertising and marketing. With new partnerships forming in both Jordan and the West Bank in renewable energy, youth workforce development organizations may wish to strengthen ties with institutions of higher learning and TVET centers to support skills development and job placement in the industry where feasible. Given the relatively low percentage of women in the renewable energy workforce, organizations could help to foster a more gender-equal workforce in the industry by targeting outreach to potential female employees.

Retail

The COVID-19 pandemic heavily impacted the retail industry and exposed the sector's vulnerability. The economic impacts of the pandemic led to the shuttering of many small retail businesses in both Jordan and Palestine and caused a significant number of youth to lose employment. Although the start of the pandemic ushered in an initial increase in demand in retail and wholesale globally as individuals stockpiled essential goods, industries unrelated to food or medicine experienced a significant demand-side shock. Less essential products, luxury items, and retail items linked with tourism were particularly affected, as were small businesses.³⁰⁵

A year and a half into the pandemic, 4% of employed Jordanian youth who responded to the youth survey conducted under this study and 0% of refugee youth were working in retail. In Palestine, only 2% of employed youth in Gaza and none in the West Bank were working in retail. These figures suggest that there is significant potential to increase the integration of young people into the retail sector during the COVID-19 recovery. However, although the sector is likely to expand over time, youth may be hesitant to work in retail given the instability that the sector experienced during

the early stages of the pandemic.

Some subject matter experts consulted for this report felt that despite the significant toll that the pandemic had on the retail sector, employment in retail would rebound during the economic recovery. However, neither youth surveyed in Jordan nor Palestine felt that retail would be one of the most promising sectors for generating youth employment opportunities over the next two years. Only 0.3% of surveyed Jordanian youth and no refugee youth felt that the sector was promising. In Palestine, retail was not identified as being a highly promising sector by any youth in either the West Bank or Gaza.

Retail in Jordan

The GoJ has outlined commitments to support an enabling environment for business, including by enhancing competition, increasing the export of goods and services, and fostering links between sectors. These goals have the potential to support the retail industry, which has historically contributed a large share to Jordan's exports, primarily in textiles. In 2020, Jordan exported \$1.6 billion in textiles, which accounted for 22% of Jordan's total exports.³⁰⁶ In addition, the wholesale and retail sectors formed a critical source of employment in Jordan prior to the pandemic, accounting

The economic impacts of the pandemic led to the shuttering of many small retail businesses in both Jordan and Palestine and caused a significant number of youth to lose employment



for approximately a fifth of Jordan's labor force in 2017.³⁰⁷

Prior to the COVID-19 pandemic, Jordan was considered to be one of the least saturated retail markets in the MENA region, with potential for growth as it shifts to more modern retail models. The opening of new malls and outlets, such as the Abdali and Taj malls in Amman, have facilitated the expansion of job opportunities in the retail sector.³⁰⁸ Employers in Jordan have struggled to hire and retain qualified staff in retail, citing a lack of adequate training programs and a misconception of the retail industry as lacking opportunities for career progression as key challenges.³⁰⁹

Some funders and workforce development implementers have advanced initiatives to help expand the pool of qualified and motivated retail staff. Beginning in 2016, EBRD financed a project to train and place 2,000 youth in jobs in retail, hospitality, entertainment, and facility management through the Abdali Mall Recruitment and Training Centre (AMRTC), which was built on-site and is managed by EFE-Jordan. The initiative was specifically designed to train young people, women, and refugees. Throughout the pandemic, AMRTC and EFE-Jordan continued to offer virtual training.³¹⁰

As Jordan shifts to more modern retail practices, online retail is likely to be an area for growth. In 2019, about 89% of Jordanian consumers had access to the internet.³¹¹ However, there is potential to increase the consistency of quality internet access given that only 53.9% of respondents to a recent UNDP survey in Jordan agreed somewhat or strongly that they had sufficient internet access to allow themselves and their families to carry out necessary activities such as shopping, education, and work.³¹²

Prior to the pandemic, e-commerce had yet to thrive in Jordan, accounting for only 1.9% of retail

sales in 2017. High logistics costs, price sensitivity among the middle class,³¹³ and the preference for cash-on-delivery (COD) payment models constitute barriers that will need to be overcome to advance this new retail modality.³¹⁴ However, the rising level of disposable income among youth, increasing levels of internet access, and tax exemptions for online purchases suggest that there is potential for online retail to grow.³¹⁵

Despite an optimistic forecast for the retail sector in Jordan, growth in the industry remains susceptible to decline due to conflict in the region, shocks in oil prices, and ongoing high retail fees. In 2017, customs fees in Jordan reached 20%, sales tax was 8%, and duty on luxury goods had increased by 16%. These fees are generally passed on to consumers, which can make some goods inaccessible to the middle class.³¹⁶

Retail in Palestine

Leading up to the pandemic, the retail and wholesale sector in Palestine had expanded significantly over the prior few decades and had shown higher rates of job growth compared to other sectors. The Palestinian retail sector is primarily comprised of small and microenterprises, many of which cater to the domestic market.³¹⁷ However, some Palestinian retailers are engaged in export activities pertaining to a wide range of goods including stone, furniture, agricultural products, and others. Stone and marble products comprise the largest share of Palestinian exports. In 2020, total stone, marble, and related exports were valued at USD 151.49 million and accounted for 14% of overall exports.³¹⁸

The pandemic has had significant impacts on the retail industry in Palestine. As noted previously, local stakeholders and subject matter experts consulted for this report explained that the COVID-19 lockdowns sparked a domino ef-



As the economic recovery gets underway, the shifts to more modern retail models, including modern malls and e-commerce, are likely to create cross-sector employment opportunities for youth

fect in which lower business revenues resulting from reduced consumer demand led Palestinian businesses to decrease salaries or lay off staff, which then further depressed demand due to the effects of the layoffs on individual incomes. Although many workers were impacted by layoffs in the retail sector, the sector's informal and self-employed workers were affected most heavily. These individuals were not covered by the tripartite agreement that the PA negotiated with the private sector and the Palestinian General Federation of Trade Unions, leaving them with little or no income if they lost employment after the start of the pandemic.³¹⁹

As in Jordan, Palestinians in both the West Bank and Gaza have been slow to transition to modern retail modalities. New, modern malls have been opened in both the West Bank and Gaza, however, catering to the middle class.³²⁰ E-commerce has been similarly slow to emerge in Palestine, including from international courier services, in part, due to limitations in access to and trust in digital banking as well as a preference for the COD model.³²¹

However, despite this initial hesitancy, the pandemic has increased the rate of e-commerce

expansion in Palestine. Many Palestinian businesses have found it necessary to tap into online resources during the COVID-19 crisis to keep their businesses afloat.³²² Local vendors have begun using online systems, with a heavy emphasis on social media platforms including Facebook and Instagram, to promote their businesses and organize delivery services. Some Palestinian vendors have gone beyond social media to launch their own online stores through open source e-commerce technologies or through subscription-based storefront e-commerce platforms.³²³

Given that 83.5% of households in the West Bank and 72.7% of households in Gaza have home internet connections,³²⁴ there is significant potential for the continued expansion of e-commerce in Palestine if access to DFS is expanded, Palestinian consumers continue to increase their level of comfort with e-commerce, and increasing numbers of local retailers expand their e-commerce offerings.

Potential for Youth Employment in Retail

As the COVID-19 recovery advances in Jordan and Palestine, it is likely that the retail sector will continue to recover and generate an increasing number of employment opportunities, including for youth, women, and refugees. However, the pace of this expansion will be dependent upon the wider economic recovery and its impact on consumer spending. Rising prices on essential items in Jordan and Palestine, particularly food staples,³²⁵ may delay the recovery as consumers direct increasing shares of their incomes to cover their basic needs.

However, as the economic recovery gets underway, the shifts to more modern retail models, including modern malls and e-commerce, are likely to create cross-sector employment opportunities for youth. IT and digital marketing skills



are closely aligned with online retail, providing potential job opportunities for computer savvy youth. For on-site employment, youth may benefit from an expansion of opportunities ranging from sales to store management.

On-site training and placement models, such as AMRTC, have been shown to be successful at preparing youth, including women and refugees, to succeed in careers in the retail sector. Youth workforce development organizations could learn from this model to provide training that produces strong employment outcomes in the retail sector. The project has generated a number of promising practices, some of which are specific to Jordan, but others of which are also relevant to programming in Palestine. These practices include: locating concrete job opportunities for youth job placements, identifying employers looking to recruit refugees, advocating to the MoL to allow refugees to work in positions that are not being filled by Jordanians, and helping companies attract workers through transparency in pay and the inclusion of benefits.³²⁶

Furthermore, given the diverse nature of the retail industry and its multiple modalities, youth could benefit from training that focuses on soft and transferrable skills, allowing them to build on experience to advance within the retail sector.

Vocational Fields

Many of the key stakeholders and subject matter experts consulted for this study stressed the importance of vocational jobs across a wide range of industries and trades including construction, technical maintenance, HVAC, plumbing, cleaning, and domestic work. Stakeholders stressed that there were many jobs in these fields, but that they are often overlooked by Jordanian and Palestinian youth. They explained that youth overlook vocational occupations due to cultural stigmas

against jobs that require manual labor, in addition to the emphasis placed within Jordanian and Palestinian societies on higher education through universities rather than TVET institutions.

Many interviewees recommended that the GoJ and PA, as well as other stakeholders working in these areas, increase their focus on providing TVET and on encouraging youth to enter trade schools. They noted that vocational jobs sometimes provide higher salaries than white-collar jobs because of the shortage of labor and relevant skill sets in these professions. Interviewees in Jordan referenced examples in which the GoJ had successfully reframed work in gas stations and refuse collection to reduce the cultural stigma that many Jordanians held toward them. This was achieved by professionalizing the positions and providing more appealing job titles. Interviewees recommended similar approaches to reframing domestic work and cleaning, as well as other industries.

Vocational jobs sometimes provide higher salaries than white-collar jobs in Jordan and Palestine because of the shortage of labor and relevant skill sets in these professions

A year and a half into the pandemic, 8% of employed Jordanian respondents to the youth survey and 14% of employed refugee respondents reported that they were working in vocational fields such as automotive repair, mechanics, security,



cosmetology/beauty, and cuisine. In Palestine, this share was much lower – only 1% of employed youth in Gaza indicated that they were working in the power/utilities sector, but none of the surveyed youth from either the West Bank or Gaza reported that they were employed in any other vocational fields. As with other sectors, variation in the sector focus of EFE-Jordan and EFE-Palestine trainings during the sample period may have affected these distributions. EFE-Jordan has placed a relatively greater focus than EFE-Palestine on vocational training over the past few years.

Youth in Jordan were also more likely than youth in Palestine to believe that there were promising employment opportunities in vocational fields. Regarding the automotive mechanics industry, 11% of Jordanian youth and 7% of refugee youth in Jordan felt that the industry was likely to offer the most job opportunities for young people over the next two years, compared to only 3% of respondents in the West Bank and no respondents in Gaza. A similar pattern was observed regarding the restaurant and cuisine industry – 9% of Jordanian youth and 25% of refugee youth felt that it was promising, compared to only 1% of respondents in each the West Bank and Gaza.

In addition, surveyed refugee youth in Jordan were nearly seven times as likely as Jordanian youth to feel that the HVAC industry would offer the most job opportunities for young people over the next two years (20% compared to 3%). In Palestine, only 1% of surveyed youth in the West Bank, and no respondents in Gaza felt that the industry would be a promising source of jobs. Finally, only 3% of Jordanian youth and 2% of refugee youth felt that the power/utilities industry would offer significant opportunities, while only 0.5% of youth in Gaza and no youth in the West Bank agreed.

Vocational Fields in Jordan

Over the past decade, the Jordanian government has highlighted the importance of TVET institutions in providing youth with practical knowledge related to skilled trades. The Jordanian National Employment – Technical and Vocational Education and Training (E-TVET) Strategy notes that a primary reason for high unemployment in Jordan is an educational imbalance in the labor market, including an oversaturation of Jordanians with academic degrees from higher education institutions and a shortage of laborers and technicians with vocational training certifications. The shortage of qualified Jordanian nationals in skilled trades has led many employers to rely on foreign workers to fill openings in their companies – a trend that the GoJ is now seeking to curtail.³²⁷

Surveyed refugee youth in Jordan were nearly seven times as likely as Jordanian youth to feel that the HVAC industry would offer the most job opportunities for young people over the next two years

A 2021 labor market assessment produced by the International Catholic Migration Commission focusing on opportunities for Syrian refugees and host communities in Jordan found that there was particular demand in the following vocational industries and professions: air conditioning maintenance, mobile phone maintenance, machine operation and maintenance, restaurant service,



security guards for housing and commercial buildings, pipe welding, and shipping and cargo workers, particularly in Mafraq governorate.³²⁸ In an employer survey conducted by UNHCR, companies in the motor vehicle repair business and traditional trades and crafts noted that they consistently faced difficulty recruiting skilled employees.³²⁹

The Jordanian Higher Population Council (HPC) has identified social stigma as the main reason behind the shortage of Jordanian nationals in vocational trades. Traditionally, enrollment in TVET institutions has been reserved for students with low levels of academic achievement, and many Jordanians believe that vocational jobs lack opportunities for career advancement. One of the challenges that the HPC identifies is a lack of strong career counseling services in schools to offer guidance on vocational occupations, including their career pathways.³³⁰ TVET officials note that the stigma against vocational trades is a challenge for the industry, adding that youth who complete vocational training have high employment rates.³³¹

The Jordanian E-TVET Strategy proposes a number of solutions to encourage youth to participate in the vocational training system in higher numbers and improve the alignment of TVET programs with the needs of the labor market. These include initiatives aimed at increasing the participation of women and other vulnerable groups, such as gender-sensitive curricula and classroom settings, highlighting opportunities for women in non-traditional occupations, improving working conditions and opportunities for gaining experience on-the-job, increasing access to remote work opportunities, providing opportunities for self-employment and microenterprise development, and improving accessibility for participants with disabilities.³³²

Palestine and Jordan face similar challenges in meeting market demands for qualified professionals in skilled trades given social stigmas around vocational work

Other initiatives aim to improve job placement outcomes for TVET graduates. These initiatives include: 1) providing career guidance for TVET students in order to propose paths that both align with their interests and offer promising job prospects, 2) sharing details on various job profiles including the content of the work and required skills and qualifications, in addition to providing information about available training courses for those jobs, and 3) providing employability training in job search and retention skills.³³³ The JEGP also highlights the promise of entrepreneurship and self-employment to create job opportunities for youth in various vocational fields, and recommends incorporating entrepreneurship training into TVET curricula.³³⁴

The international development agency of the German Government, GIZ, has invested heavily in improving vocational education and employment opportunities in Jordan. In 2019, GIZ launched a project entitled “Employment-Oriented Qualification in the Skilled Crafts” to promote training and employment in modern skilled trades.³³⁵ The project highlights opportunities in a number of occupations, including the construction and finishing trades, bakery, hairdressing and cosmetology, metal and precision crafts, welding technology, carpentry, painting and varnishing.³³⁶



One of the main focus areas of the project was a national campaign to improve the perception that Jordanians have of employment in skilled crafts, which was implemented by EFE-Jordan. According to surveys conducted by EFE-Jordan before and after the campaign, there was a significant improvement in the perception of skilled crafts professions among parents, youth, and school students who followed the campaign relative to the comparison group who did not. Respondents who saw the campaign were more likely than those in the comparison group to express an intention to pursue a career in skilled crafts or encourage their son, daughter, or a friend to enter the sector.

Vocational Fields in Palestine

A significant share of the Palestinian population is employed in vocational fields. According to PCBS, craft and related trade workers made up 20.7% of the Palestinian labor force during the third quarter of 2021. In the West Bank, craft and trade workers constituted 24.1% of the labor force, while they made up 10.2% of the labor force in Gaza.³³⁷ The promise of vocational training and career paths in Palestine to increase youth employment rates, encourage employment in the private sector, and spur entrepreneurship has been noted in the literature.³³⁸

However, Palestine faces similar challenges as Jordan in meeting market demands for qualified professionals in skilled trades given social stigmas around vocational work. While there is a need for skilled workers across a variety of vocational occupations including builders, joiners, painters and decorators, car mechanics, and plumbers, the Palestinian educational system prioritizes higher education at universities over vocational training.³³⁹ As in Jordan, many Palestinians view vocational employment as a less attractive career path, and there is insufficient awareness of and trust in vocational training institutions.³⁴⁰

Although TVET enrollment in Palestine is low by regional and international standards, Palestinian TVET institutions also struggle with limited enrollment capacity. In addition, the institutions are characterized by uneven regional distribution across the West Bank and Gaza, and have not provided sufficient access for female students.³⁴¹

A 2018 UNESCO study reported that VTIs in Palestine were unable to produce enough skilled graduates to meet market demand in a number of trades. The employer survey that UNESCO administered found that approximately 21% of companies employing vocational graduates were unable to recruit sufficient levels of workers to meet their needs.³⁴²

A 2019 tracer study of 788 graduates of four vocational training and employment programs implemented by GIZ and the Belgian Development Agency Enabel confirmed that there was high demand for graduates in certain skilled trades. Specifically, the study found that youth who completed training in carpentry, automotive and electricity-based vocations were able to quickly transition into the workforce, with the majority of these youth securing jobs immediately after graduation. Graduates in fields such as agriculture, service, beauty and communication generally faced longer job searches after completing their training.³⁴³

**There is strong potential
for youth employment in
vocational fields in both
Jordan and Palestine**



The EU has also been engaged with GIZ in supporting TVET education and employment in Palestine. A tracer study on initial work-based learning initiatives in vocational sectors demonstrated that 80% of graduates from these programs found employment or were self-employed within one year of graduation, compared to a maximum of 60% in traditional TVET programs.³⁴⁴

In order to address demand among private sector companies for skilled employees in vocational trades, the Palestinian MoL is working to deliver training incorporating work-based-learning components for a number of occupations and topics, including: painting and decoration, fashion design, survey engineering, aluminum works, electrical equipment maintenance, electrical installations and solar energy, air conditioning, car electricity, metal works and metal formation, vehicle mechanics, and vehicle body works and painting.³⁴⁵

Potential for Youth Employment in Vocational Fields

There is strong potential for youth employment in vocational fields in both Jordan and Palestine. In Jordan, vocational industries offer substantial employment opportunities for both Jordanian nationals and refugee populations. A 2021 IFC study found that vocational occupations and trades were among the top three industries of employment for Syrian refugees, both men and women, in host communities – 15% of Syrian men were employed in skilled trades such as electrical work, plumbing and carpentry, while 12% of Syrian women were engaged in cleaning, housekeeping, and guarding professions.³⁴⁶

In Palestine, the high rates of labor force participation and employment following TVET training, coupled with strong demand from employers, make skilled trades promising avenues for wage

or self-employment in both the West Bank and Gaza. However, workforce development organizations wishing to train youth in this area should collaborate closely with Palestinian TVET institutions and the PA before attempting to implement large-scale solutions given the abovementioned enrollment capacity constraints.

In both Jordan and Palestine, youth workforce development organizations should implement programs and campaigns focused on diminishing the social stigma associated with vocational education and employment in order to attract more youth to the field. Activities such as the GIZ “Employment-Oriented Qualification in the Skilled Crafts” project that highlight TVET careers as dignified employment opportunities with career growth potential may help to combat negative societal perceptions of these careers. In addition, youth workforce development organizations and TVET institutions should partner with private sector companies to offer apprenticeships, internships, and other forms of work-based learning and on-the-job training as part of programming given the positive results demonstrated by programs of this type.

Entrepreneurship and Self-Employment as a Path to Economic Opportunity

As noted by the World Bank and others, one of the key challenges that has contributed to youth unemployment in both Jordan and Palestine has been insufficient job creation to keep up with population growth.³⁴⁷ Several local stakeholders and subject matter experts consulted for this report noted that the job shortage means that entrepreneurship will be an important avenue for youth to pursue in the coming years, noting that this would likely be particularly important for vulnerable youth who lack access to wage employment opportunities.



The GoJ and PA have made entrepreneurship a key element of the economic growth strategies for Jordan and Palestine

The GoJ and PA have made entrepreneurship a key element of the economic growth strategies for Jordan and Palestine. Under the REACH 2025 initiative, the Jordanian MoICT is seeking to support the creation of up to 7,000 new businesses and 130,000 new jobs by 2025 in the ICT sector alone.³⁴⁸ In addition, the Palestinian MoL is emphasizing the importance of entrepreneurship and self-employment in providing decent work and employment opportunities across Palestine in its Labor Sector Strategy (2021-2023).³⁴⁹

However, local stakeholders and subject matter experts consulted for this report also mentioned that challenges related to the enabling environment for entrepreneurship in both Jordan and Palestine will need to be addressed in order to support its expansion. Palestine ranked 173rd out of 190 economies in terms of the ease of starting a business on the Doing Business rankings of the World Bank due to the procedures, time, and cost involved in this endeavor.³⁵⁰ Jordan fared slightly better in this area, but ranked 120th out of 190 economies.³⁵¹

Access to finance is a perennial concern cited by aspiring entrepreneurs as well as organizations looking to support business start-ups. A local stakeholder in Jordan consulted for this report noted that local banks can be risk averse and therefore hesitant to invest in new business start-ups that may fail. The interviewee stated that

while there are a large number of business incubators and accelerators in Jordan, many people are not able to launch or expand new businesses due to a lack of seed money. A number of organizations are currently focused on addressing this challenge in both Jordan and Palestine through providing direct loans and mapping opportunities for start-up financing, including the IFC, the Palestinian Network for Small and Microfinance (Sharakeh), and GIZ.³⁵²

Subject matter experts and key stakeholders also highlighted the need for improved training and practical skill acquisition to support young entrepreneurs from vulnerable backgrounds. Interviewees mentioned the importance of training youth in basic digital skills in order to increase the resilience of their businesses in the face of shocks like those brought on by COVID-19, in addition to providing more advanced training in financial management and how to design marketable products.

While there have been a proliferation of programs focusing on training for micro-entrepreneurship and home-based business development over the past several years, particularly for women, local stakeholders noted that many people participating in these programs produce the same types of traditional handicrafts and that they often lack competitiveness in the market. As such, they noted that care should be taken to prepare youth to produce products that are differentiated from others already available in the market.

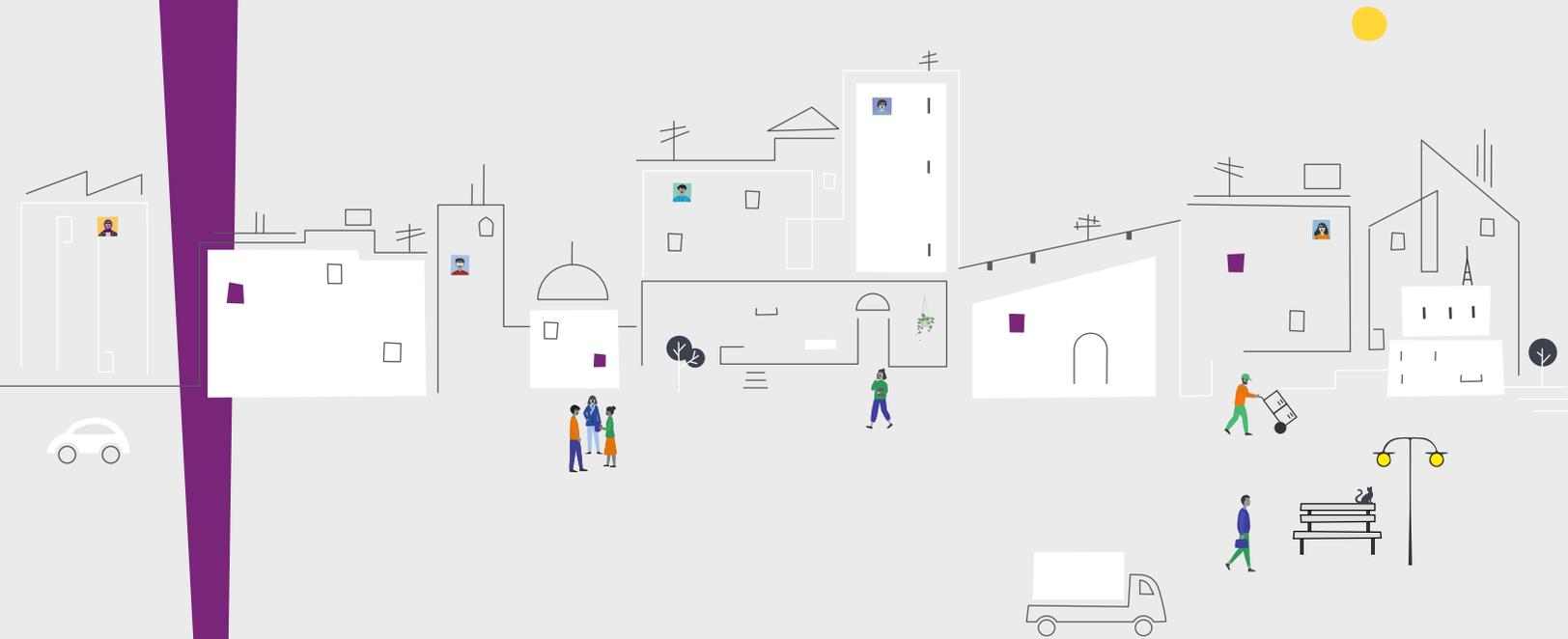
Local stakeholders also highlighted the need for youth to receive training on conducting market feasibility assessments in order to design products that will enjoy local demand. They also noted a need for youth to receive training on how to export products outside of Jordan and Palestine to gain access to additional markets. In addition, it has been noted in the literature that business,

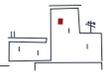


digital, and interpersonal skills, as well as an entrepreneurial mindset, are necessary for success in entrepreneurship, indicating that these constitute important areas for trainings on the topic.³⁵³ Finally, some interviewees noted the importance of practical training that allows youth to apply entrepreneurship concepts learned in the classroom into practice in a business setting.

Several implementers and international organizations such as UNDP have programs in place that aim to address challenges related to enabling environments, in addition to providing skills training to aspiring entrepreneurs. However, some local stakeholders noted that these initiatives were not sufficiently large to address the scale of the challenges facing the Jordanian and Palestinian labor markets, particularly in light of the pandemic. These interviewees felt that larger scale interventions would be necessary to have the needed impact to address systemic enabling environment issues surrounding entrepreneurship and to promote job creation more broadly.

Conclusions & Recommendations





This study has sought to understand and document the impacts of the COVID-19 pandemic on young people in Jordan and Palestine, particularly vulnerable youth, in order to identify how implementers and funders of workforce development programming can support youth as they navigate the labor market during the COVID-19 recovery.

The pandemic created unprecedented public health and economic challenges for governments, businesses, and individuals around the world. Jordan and Palestine entered the pandemic with a set of existing fiscal and economic circumstances that made it more difficult to respond to the resulting health and economic crises. Within this context, the GoJ and the PA utilized the resources and avenues available to them to cushion the impact of the pandemic on the Jordanian and Palestinian economies as much as possible. However, the magnitude of the crisis meant that both economies – and the businesses and labor force participants within them – sustained impacts that will take time to resolve.

The results of this study suggest that despite the difficulty of the COVID-19 period, many in the private sector in Jordan and Palestine are optimistic about the potential for their businesses to grow over the coming two years, both in revenue and staff size. The pandemic also created the space for exploring new work modalities through telework at a scale that would have previously been unimaginable. While many in Jordan and Palestine were unable to benefit from this development due to limited technology access and the types of occupations in which they worked, this experience may inform employer perspectives on flexible work arrangements during the COVID-19 recovery and beyond.

As this study has shown, youth and their communities faced significant and negative impacts brought on by the COVID-19 pandemic, including

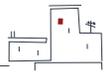
Despite the difficulty of the COVID-19 period, many in the private sector in Jordan and Palestine are optimistic about the potential for their businesses to grow over the coming two years, both in revenue and staff size

job losses and heightened barriers to securing employment, with challenges being most acute for vulnerable youth and their communities.

However, the study findings also highlight the extent to which many youth were already struggling to gain a secure footing in the labor market prior to the pandemic. This was clear from the findings regarding the insufficiency of youth incomes as well as the insecure nature of the employment arrangements of many youth at the start of the pandemic.

Furthermore, the study underscored the relatively greater challenges facing more vulnerable youth and their communities prior to the pandemic, including refugees in Jordan and youth in Gaza. These greater challenges were clear given the lower tendency of these youth to cite COVID-19 as the reason for why they were facing a shortage of job opportunities in the market.

Achieving an equitable outcome to the COVID-19 recovery will require a response that puts youth and vulnerable populations at the center, as they faced the most challenging economic circumstances prior to the crisis and lost the most throughout. These efforts should focus on job



Achieving an equitable outcome to the COVID-19 recovery will require a response that puts youth and vulnerable populations at the center, as they faced the most challenging economic circumstances prior to the crisis and lost the most throughout

quality in addition to quantity, ensuring that opportunities for youth and vulnerable populations offer sufficiently high wages to meet basic needs, provide access to formal labor contracts and related benefits, and offer stability through unlimited or longer-term contracts.

The following recommendations are intended to guide implementers and funders of youth workforce development programming in Jordan and Palestine as they work to support young people during the COVID-19 recovery. These recommendations may also be of interest to policymakers engaged in planning policy responses aimed at hastening the pandemic recovery in Jordan and Palestine.

Recommendation 1: Youth workforce development programming in Jordan and Palestine should provide targeted, wraparound services for youth alongside soft and technical skills training in order to improve labor market outcomes for vulnerable youth. This may include job placement and mentorship support to help youth navigate initially challenging periods as they first enter the

workforce. In both Jordan and Palestine, surveyed youth mentioned technical and soft skills training and assistance in locating job opportunities and connecting with employers as being among the most important services that implementers of workforce development programs should provide. Other forms of support that were particularly in-demand in Palestine included incubator services for start-ups, connections to other young job seekers, and job fairs.

Recommendation 2: Implementers should consider placing an increased focus on technical training involving apprenticeship models for young women in Jordan. Study results indicate that young women in Jordan are significantly more likely than their male peers to feel that technical skills training (71% vs. 53%) and assistance to connect with employers (25% vs. 8%) are important services for young job seekers in their cities. The tendency of female university students in Jordan to pursue studies in the humanities, and the shortage of job opportunities available that relate to these fields, likely contribute to this increased demand for technical training among young women.

Recommendation 3: Implementers and funders should prioritize youth workforce development programming that involves direct job placement support. The job placement rate for graduates from EFE's JTP programming, which involves direct job placement support, was significantly higher than the employment rate measured for the entire youth sample, which included a substantial share of youth who had completed other programming types that did not involve direct placement support. Among JTP graduates who completed training during the same period from which the sample was drawn, 63% in Jordan and 87% in Palestine secured employment, whereas 28% of the entire sample of youth in Jordan and 32% in Palestine indicated that they were working at the time of the survey. Programming that involves placement



support is more costly to run and typically longer in duration than programming that focuses on more general competencies such as job search and interview skills. Given the higher resource intensity of this type of programming, the ability of implementers to increase their focus on it will require close partnerships with funders.

Recommendation 4: Youth workforce development organizations should consider completing additional studies in order to identify evidence-based approaches to improve labor market outcomes for youth with disabilities in Jordan and Palestine. Although literature exists on the labor force participation of persons with disabilities in both locations, more work can be done to identify promising approaches that organizations can apply in practice, especially with regard to increasing labor force participation of women with disabilities and ways to effectively engage the private sector in this area. Due to sample size limitations, this study was limited in what it could contribute to this critical discussion.

Recommendation 5: Implementers and funders should consider focusing on technical boot camp models aimed at producing job-ready youth in specific technical areas that are in most demand among local ICT companies, and that could also be applied in virtual freelancing. This approach would create the most potential for youth to seek

a variety of employment opportunities in the ICT field. For example, if smartphone application development was identified as a skill with a concrete market need, youth completing a boot camp in app development could be connected with local employers looking to hire entry-level app developers, and youth could also seek opportunities to secure freelance contracts working on app development.

The boot camp model, although more resource intensive than shorter, lighter touch approaches, has the benefit of providing youth with a significant level of technical knowledge that could enable them to independently build upon their skills following the training. This approach would also increase the extent to which program graduates could distinguish themselves within the highly competitive virtual freelancing space. Given that youth working on virtual freelancing are competing within a global talent pool, skill differentiation will be critical for youth to secure sustainable economic opportunities. This is particularly relevant for youth in Jordan and Palestine who aim to work in markets outside of the MENA region, as they will face competition from markets where the cost of living is lower, and where freelancers can therefore charge lower prices.

It is important to note that a moderate level of English proficiency is typically required to sup-





port the pursuit of these types of technical skills. As such, in order to promote inclusion of more vulnerable youth, implementers may consider offering English language training alongside technical boot camps.

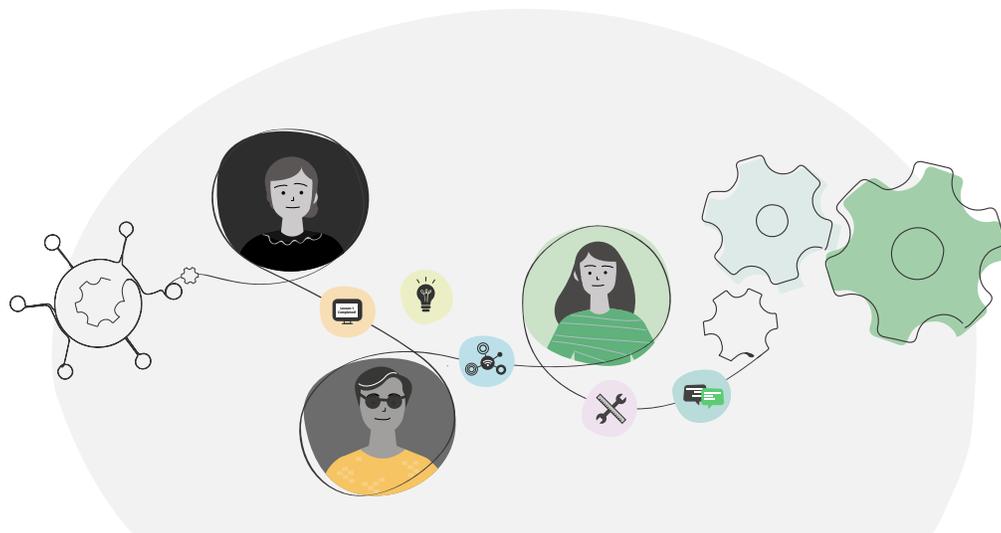
It is beyond the scope of this study to identify the most in-demand ICT skills in the Jordanian and Palestinian markets. Implementers wishing to work in this area should consult local ICT companies as well as professional organizations in Jordan and Palestine.

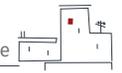
Recommendation 6: Implementers and funders should focus on developing virtual freelancing capacity among youth in Gaza given the significant restrictions that exist for other avenues of employment. In Gaza, virtual freelancing presents one of the most promising options for youth economic opportunities. However, implementers should take care to avoid duplication with existing initiatives. Boot camp models, as discussed above, could be promising to prevent an oversaturation of youth working in technical areas that require less training, such as basic graphic design.

Recommendation 7: Implementers and funders should consider technology hub models for virtual jobs that encourage youth to form freelancing teams rather than working in isolation. Local

Efforts to support youth during the COVID-19 recovery should focus on job quality in addition to quantity, ensuring that opportunities offer sufficiently high wages to meet basic needs, provide access to formal labor contracts and related benefits, and offer stability through unlimited or longer-term contracts

stakeholders noted that many youth lack the skills to secure contracts from abroad and that there is potential for local firms to secure opportunities and then hire freelancers, rather than youth working independently to secure and deliver on contracts. Although it is important for youth working in virtual freelancing to understand how to use freelancing platforms and how to engage





with clients abroad, programming that focuses on training large numbers of youth in these skills in order for them to work in isolation could be placing youth into competition with one another.

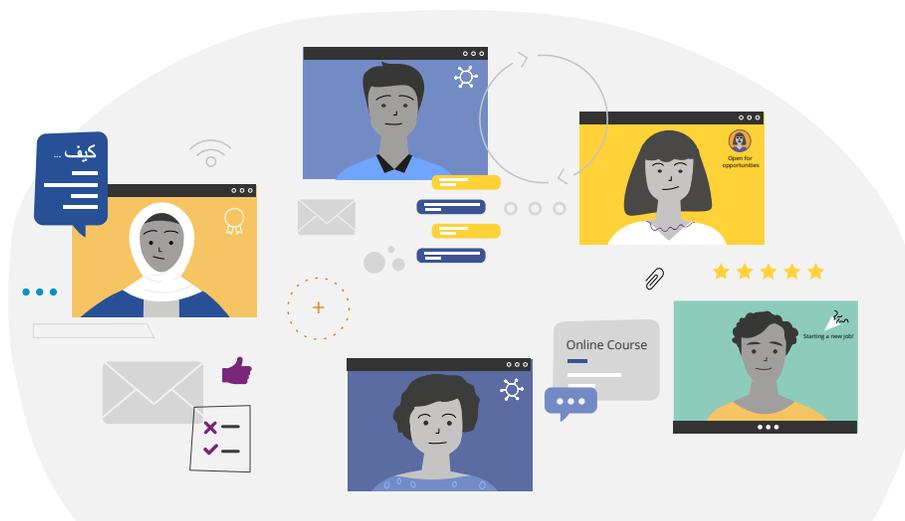
If implementers focus instead on training youth to form consulting teams with the support of technology hubs, the efficiency of the freelancing projects could increase and youth could secure more steady streams of income. This approach would also provide opportunities for youth to develop their teamwork and entrepreneurship skills, making virtual freelancing jobs move beyond self-employment alone. The hubs could also help close the gap in technology access that creates barriers for youth from more vulnerable backgrounds to engage in freelancing opportunities.

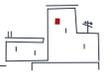
Recommendation 8: Additional efforts should be made to increase the level of interest that Jordanian and Palestinian youth have in vocational jobs. There is strong potential for youth employment in vocational fields in both Jordan and Palestine, and local stakeholders noted that jobs in skilled trades sometimes offer higher salaries than white-collar jobs because of the shortage of labor and relevant skill sets in these professions. However, cultural stigmas against jobs that require manual labor and an emphasis on higher education through universities rather than TVET

institutions lead many youth to overlook opportunities in these fields.

In order to advance youth employment in this area, implementers and funders should prioritize programs and campaigns focused on diminishing negative stereotypes associated with vocational education and employment in order to convince more youth to pursue training in skilled trades. For their part, policymakers can work on professionalizing vocational jobs in order to ensure that workers in these positions are treated with dignity. Additionally, implementers and TVET institutions should partner with private sector companies to offer work-based learning opportunities alongside classroom instruction in order to facilitate trainees' transition to the workforce after completing programming.

Recommendation 9: In Jordan, implementers of workforce development programming should prioritize training youth for jobs in sectors that are expected to grow during the COVID-19 recovery, such as the ICT sector – including virtual jobs – and manufacturing, in addition to vocational fields. Hospitality, tourism and service jobs are also likely to resurge, although near-term growth in these industries is heavily reliant on the course of the pandemic. The agriculture and food processing sectors offer considerable opportunity





for self-employment in Jordan, including for refugee populations.

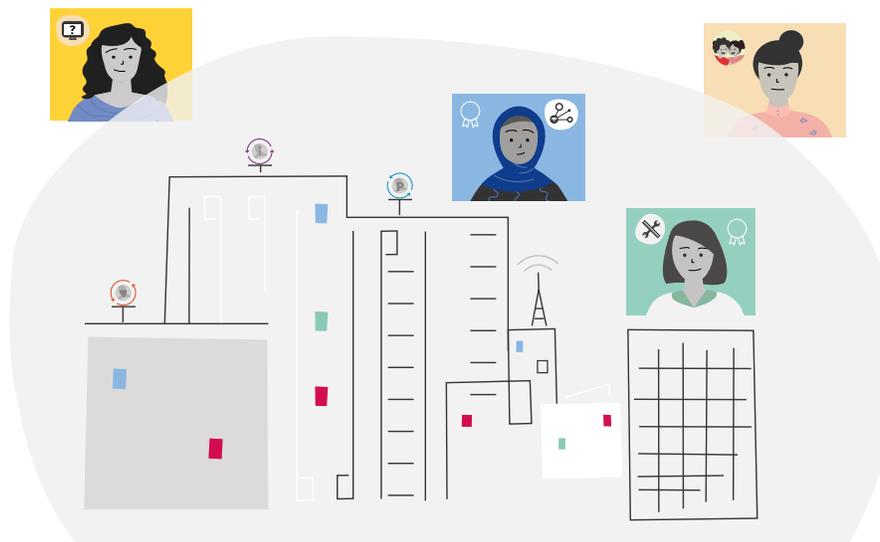
Recommendation 10: In Palestine, priority sectors for youth workforce development programming should include ICT and virtual jobs, vocational fields, and healthcare. As with Jordan, hospitality, tourism and service jobs are also likely to resurge, but will be subject to developments related to the pandemic. Implementers should follow developments related to the construction industry to determine if local and regional political dynamics offer the potential for job growth. Finally, food processing will offer opportunities for self-employment in both the West Bank and Gaza.

Recommendation 11: Implementers and funders should focus particular effort on integrating women into youth workforce development programming in order to address the long-standing challenge of low women’s labor force participation rates in Jordan and Palestine as well as the additional challenges hampering women’s employment brought on by the pandemic.

Implementers focused on employment programming for women should seek opportunities to en-

gage them in non-traditional fields such as mobile maintenance and other ICT-driven fields as well as vocational work, while remaining attentive to cultural norms and practical considerations affecting women’s job placement and retention. These considerations include, but are not limited to, the need for safe transportation options and the availability of childcare. There is also considerable opportunity for women to generate income through self-employment, although these programs should ensure that new micro-businesses respond to market demand in addition to the skills and interests of young women participants.

Recommendation 12: Implementers should consider working directly with private sector employers to develop and roll out onboarding programs that help close gaps in the technical and soft skills of youth in order to increase their success on-the-job. Programs of this type would not only benefit youth by bringing their skills into line with market needs, they would also benefit employers through improved employee productivity and retention. Implementers could approach this endeavor through a workshop model that convenes multiple employers in a single engagement or through one-on-one models.



Key Stakeholders and Subject Matter Experts Consulted

Abdulkarim Mustafa	Local Economic Development Officer	United Nations Development Programme
Abeer Mashni	Social Safeguards Specialist	The World Bank
Ahmad Uwaidat	Managing Consultant	Al Markaz for Development & Marketing Consultancies
Alaa Taha	Director of Projects	Chamber of Commerce, Gaza
Anas Iqtait	Non-Resident Scholar	Middle East Institute
Angela Elzir Assy	Labor Market Specialist	The World Bank
Dr. Wael Dayia	Independent Consultant	
Dr. Yara M. Asi	Assistant Professor	University of Central Florida
Eliana Janineh	General Manager	Jordan Restaurant Association
Fadi S. Abdellatif	Assistant Director, Economic Growth & Infrastructure	USAID, West Bank and Gaza Mission
Fiona Allen	Senior Development Officer	UNHCR
Ghadeer Khuffash	Chief Executive Officer	Education For Employment – Jordan
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Mohamed Nayef	Founder & General Manager	Opeducate.com
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Reem Aslan	Gender Technical Specialist	International Labour Organization, Regional Office for Arab States
Rozan Waseem	Founder & Chief Executive Officer	Rozza Designs
Said Dwikat	National Coordinator, Palestine	UNIDO
Samer Salameh	Deputy Minister	Ministry of Labor, Palestine
Samir Murad	Former Senator & Minister of Labor	Ministry of Labor, Jordan
Saro Nakashian	Chief Executive Officer	Education For Employment - Palestine
Youssef Habesch	Resident Representative, West Bank & Gaza	International Finance Corporation

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COVID-19 and Youth Employment in Jordan and Palestine: Impacts, Opportunities, and a Way Forward draws on youth and employer survey results to document the impacts of the COVID-19 pandemic on young people in Jordan and Palestine, with an emphasis on vulnerable youth including refugees in Jordan, youth in Gaza, youth with disabilities, and young women. The report also charts a path for workforce development organizations, funders, and policymakers to support the integration of youth in the labor market during the COVID-19 recovery through skills training and employment support services directed at the sectors most likely to grow during this period.

EFE's mission is to create economic opportunities for unemployed youth so they can create a brighter future for themselves, their families, and their communities. To learn more, please visit www.efe.org.