



Enhancing Capacities for Institution Building (ECIB) program

Labour Market Needs
Assessment Study in
the Gaza Strip

Assessment Report - Final
August 2016

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Consulting, Inc. at the request of the Belgian
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(ECIB) program**

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CONTENTS

ACKNOWLEDGEMENTS	III
ACRONYMS.....	III
EXECUTIVE SUMMARY.....	1
INTRODUCTION.....	1
OPERATING ENVIRONMENT	1
ASSESSMENT OBJECTIVES AND METHODOLOGY.....	2
KEY ASSESSMENT CONCLUSIONS.....	2
CHAPTER 1: OPERATING ENVIRONMENT	4
THE DEMOGRAPHY OF THE GAZA STRIP	4
THE GAZA STRIP ECONOMIC ACTIVITY	4
THE GAZA STRIP LABOUR MARKET	5
CHAPTER 2: ASSESSMENT METHODOLOGY	6
CHAPTER 3: ASSESSMENT FINDINGS	10
ECONOMIC SECTORS AND SUB-SECTORS.....	10
OVERALL ASSESSMENT RESULTS AT THE SECTORAL LEVEL	10
THE EMPLOYABILITY MATRIX VARIABLES.....	11
A.EMPLOYABILITY	11
B. TVET READINESS.....	13
C. INVESTMENT.	15
D.MARKET.....	16
E. INSENSITIVITY TO EXTERNAL FACTORS	17
THE EMPLOYABILITY MATRIX SCORING	19

LIST OF ANNEXES

ANNEX 01: TERMS OF REFERENCE	20
ANNEX 02: 22LIST OF CONSULTED DOCUMENTS	22
ANNEX 03: LIST OF CONSULTED INDIVIDUALS AND BUSINESSES.....	23
ANNEX 04: ASSESSMENT TOOLS.....	27

LIST OF TABLES

Table 1: Labour Force Participation in Palestine – 2nd Quarter 2016
Table 2: Unemployment in Palestine by age and sex - 2nd Quarter 2016
Table 3: Assessment classification of economic sectors and sub-sectors
Table 4: Employability matrix variable: definitions, indicators and weights
Table 5: Assessment overall results at the sectoral level with respect to the five defined assessment components

LIST OF FIGURES

Figure 1: Population Pyramid in Palestine, Mid-2016
Figure 2: Rate of Change of Real Value Added by Economic Activity (year-on-year, q1/2016)
Figure 3: Assessment methodological framework
Figure 4: Distribution of reached sample of the targeted businesses by economic sector (n=117)
Figure 5: Overall results of the assessment at the sectoral level
Figure 6: Assessment overall results at the sectoral level with respect to Employment Capacity variable
Figure 7: Assessment overall results at the sectoral level with respect to TEVET Employment Capacity variable
Figure 8: Assessment overall results at sectoral level with respect to Diversity of Needed TVET Specialisations variable
Figure 9: Assessment overall results at the sectoral level with respect to Skill Requirement variable
Figure 10: Assessment overall results at the sectoral level with respect to Business Technology variable
Figure 11: Assessment overall results at the sectoral level with respect to Gender variable

Figure 12: Assessment overall results at the sectoral level with respect to Readiness of TVET Institutions variable

Figure 13: Assessment overall results at the sectoral level with respect to Private Sector Perception of TVET Institutions

Figure 14: Assessment overall results at sectoral level with respect to Investment Trend over the past 3 years variable

Figure 15: Assessment overall results at sectoral level with respect to Investment Potential over the next 3 years variable

Figure 16: Assessment overall results at the sectoral level with respect to Ease of Establishment variable

Figure 17: Assessment overall results at the sectoral level with respect to Competitiveness variable

Figure 18: Assessment overall results at the sectoral level with respect to Source of Input variable

Figure 19: Assessment overall results at the sectoral level with respect to Product Market variable

Figure 20: Assessment overall results at the sectoral level with respect to Insensitivity to External Factors variables

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ACRONYMS

ICT	Information, Communication and Technology
FGD	Focus Group Discussion
KII	Key Informant Interview
ToR	Terms of Reference
ECIB	Enhancing Capacities for Institution Building
BTC	Belgian Development Agency
TVET	Technical and Vocational Education and Training
LMNA	Labour Market Needs Assessment
MoEHE	Palestinian Ministry of Education and Higher Education
MoL	Ministry of Labour
WBL	Work-Based Learning
GDP	Gross Domestic Product
PCBS	Palestinian Central Bureau of Statistics

EXECUTIVE SUMMARY

INTRODUCTION

The Enhancing Capacities for Institution Building (ECIB) programme is funded by the Belgian Government and is implemented through cooperation between the Belgian Development Agency (BTC) and the Palestinian Ministry of Education and Higher Education (MoEHE) and the Ministry of Labour (MoL).

The ECIB programme focuses on improving the qualitative and quantitative aspects of Work-Based Learning (WBL) practises of the technical and vocational education and training (TVET) programmes in Palestine. The programme is aligned to the national TVET strategy and the five-year plan of relevant ministries (MoEHE and MoL).

The key issues the ECIB programme concentrates on are:

- 1) **Apprenticeships, internships, scholarships, etc.:** The programme will not be dependent on any strict definition of the above nor be limitative to either or; in general under WBL it is to be understood any kind of scheme facilitating the transition from school-to-work resulting in a trainee spending time at the work floor during or right after graduation, including informal apprenticeships and first employment promotion.
- 2) **TVET sub-sector:** The programme focuses on the TVET sub-sector, including private sector providers, vocational training centres over industrial schools to technical colleges at the higher education level. The programme will not focus on academic (university) systems as such, but could be integrated or aligned to relevant administrative and management examples of similar schemes.
- 3) **Capacity building:** The programme aims to enhance the institutional capacity of the governmental and private sector institutions involved in technical and vocational skills development to allow them to facilitate, supervise and implement work based learning models at national, district and local level.
- 4) **Gender and disadvantaged groups:** The programme aims to open up educational and economic opportunities for youth from lower income families with a focus on pro-poor, pro-gender, environment-friendly and pro-good governance orientations in programme policies, selection process and selection criteria. Through attributing scholarships, the programme seeks to pro-actively enhance the access to training and coaching of economically and socially disadvantaged learners.

OPERATING ENVIRONMENT

The Gaza Strip is one of the most densely populated areas in the world, with more than 5,000 people per square kilometre. The Palestinian Central Bureau of Statistics (PCBS) estimates the total population of the Gaza Strip at mid-2016 to be 1.88 million. Over the past 10 years, the Gaza Strip has been suffering from an Israeli imposed blockade, political division and instability, the tunnels trade closure with Egypt and has witnessed three military assaults in 2008-2009, 2012 and 2014. According to PCBS, the poverty rate in the Gaza Strip has been estimated at 38.3%, 38.0% and 38.8% in 2009, 2010¹ and 2011² respectively.

Real Gross Domestic Product (GDP) in the Gaza Strip in the 1st quarter 2016 was 1.4% higher than in the 4th quarter 2015. Year-on-year growth rate accelerated in the Gaza Strip and expanded by 21.1%. The main contributor to this growth is the construction sector that grew by 190.2%. The GDP per capita in the Gaza Strip is about half of that in the West Bank.³

The Labour Force Participation Rate in the Gaza Strip is estimated by PCBS⁴ at 45.5% compared to 45.8% in the West Bank. For the past decade, Gaza has been suffering from a high rate of unemployment estimated at 41.7% compared to 18.3% in the West Bank. The highest rate of unemployment among different age groups was found in the age group of 20-24 years estimated at 61.9%. Self-employment in the Gaza Strip is estimated at 14.0% compared to 21.4% in the West Bank.

¹ PCBS, "Poverty in the Palestinian Territory, 2009-2010", Press Release, 2011

² PCBS, "Press Release on the Eve of the International Day of Refugees", June 2015

³ Office of the United Nations Special Coordinator for the Middle East Peace Process "UNSCO Socio-Economic Report: Overview of the Palestinian Economy in Q1/2016"

⁴ PCBS "The Labour Market Survey", April-June 2016

ASSESSMENT OBJECTIVES AND METHODOLOGY

ASSESSMENT OBJECTIVES: The Labour Market Needs Assessment (LMNA) Study was carried out as part of the design and implementation process of the WBL initiative implemented in partnership with TVET institutions with the goal of expanding youth employment and entrepreneurship opportunities in the Gaza Strip. This study is a succinct, short-term information-gathering effort, and is not a comprehensive national economic study. Being one of the first studies that tackle labour market TVET needs from the perspective of the private sector in the Gaza Strip, the study main objective is to identify the most promising economic sectors related to TVET in order to enable TVET partners to upgrade or start new occupations that will meet labour market needs and priorities in the Gaza Strip.

ASSESSMENT METHODOLOGY: The assessment methodology comprised of three phases: (i) inception/desk review phase to review relevant documents, prepare field work logistics plan, and develop the assessment tools; (ii) field phase to collect quantities and qualitative data; and (iii) synthesis phase to bring together the results of the field and desk review phases. Al Athar pursued realizing the LMNA study objective through pioneering the development of an assessment model “Employability Matrix” into which all gathered data from the various assessment tools fed. The Employability Matrix comprised of five components which Al Athar defined as those representing core areas where an economic sector has to have positive performance in order to be a viable option for expanding youth employment and entrepreneurship opportunities for TVET sector in the Gaza Strip. These five components are: (i) employability; (ii) TVET readiness; (iii) investment; (iv) market; and (v) insensitivity to external factors.

Data collection was carried out between the period July 17th – August 4th, 2016 and included: (i) 13 key Informant Interviews (KII); (ii) five Focus Group Discussion (FGD) meetings; (iii) one Business Survey. Overall, the assessment qualitative activities targeted 47 participants (3 female and 44 male) while the quantitative activities targeted 117 businesses. The adopted assessment methodology is discussed in details in CHAPTER 2 of this report.

ASSESSMENT TEAM: Al Athar put together a team of three professionals: Mr. Rami Wihaidi, the assessment team leader, Ms. Reham Al Wehaidy and Mr. Yasser Al Alem, assessment team members. The professional team has more than 30 years of combined experience related to the field of study. In addition a professional crew of six experienced facilitators/surveyors supported the evaluation technical team to implement the fieldwork associated with the assessment process.

KEY ASSESSMENT CONCLUSIONS

- 1) The most promising economic sectors for TVET employment and entrepreneurship in the current business environment in the Gaza Strip are: the services sector, the agriculture and fishery sector and the Information and Communication Technology (ICT) sector. It is also important to note that TVET employability potential within these three sectors may be further enhanced through targeted efforts for improving TVET readiness at the level of TVET institutions and private sector perception of TVET graduates catering these three sectors.
- 2) **The services sector:** Out of the three defined sub-sectors within the services sector, the two most promising ones were the administrative and support services followed by the accommodation and food services. **The administrative and support services sub-sector** is a growing employment sub-sector due to a growing trend in outsourcing some of the functions performed by large private and non-private entities to external service providers such as accounting, marketing and promotion, activities coordination, event organizing, data entry, etc. With that being said, this sub-sector presents a high potential for entrepreneurship as it is focused on two pillars: (i) The outsourcing business model that is growingly being recognized as a long term competitive strategy for business success due to lower infrastructure investment, enhanced focus on unique business core functions and overcoming seasonal work load that does not require employing new staff; and (ii) the backbone for these services is highly linked and dependent on technology advancement with noted focus on ICT development. Therefore, it provides an opportunity for youth and women advancement. Furthermore, this sub-sector includes economic activities that are socially acceptable for women and hence presents an area for growth potential for employment opportunities among women.

On the other hand, **the accommodation and food services sub-sector** is among the most important business areas attracting investments (during the past three years and a potential for the upcoming three years) in the Gaza Strip. Since the beginning of 2015, the Municipality of Gaza has given licenses to 195 new restaurants while 73 restaurants are waiting to be licensed⁵ constituting a high potential for TVET employment.

- **The agriculture and fishery sector:** Due to Israeli imposed restriction regarding the allowed area for fishing, fish farming presents an opportunity for new investments and therefore employment for TVET graduates. Furthermore and despite the many challenges, the agricultural sector remains a key driver of economic growth in the Gaza Strip. In addition, urban agriculture (including fish farming) is a promising field for entrepreneurship with the mandate of enhancing food security and generating increased income for small farmers (including youth and women) living in the Gaza Strip. To respond to this growth potential in demand for this specialisation, TVET institutions are encouraged to look into offering new programme of study in this area.
- **The ICT sector:** The ICT sector is known to be a borderless sector that shows lower sensitivity towards external factors influencing other sectors. Furthermore, it is also diffused and integrated in most private sector activities and therefore presenting a high potential for TVET employment and entrepreneurship. With that being said, there is a high competition between ICT university graduates and those from TVET institutions. It is important for TVET institutions to identify the exact type of TVET specialisations that are most required by businesses so that they can offer programmes that cater for private sector needs.

3) **Alternative energy** presents a high potential for creating TVET employment in the future. The deteriorating electricity situation, the fuel deficit as well as the quality of drinking water have all created new business ideas for investment. Electricity is only available for an average of six hours per day, fuel is not in constant supply and most water is not of drinking quality as supported by many international studies and publications. These problems have been growing and becoming chronically rooted in the day to day life of Gazans with no foreseen solutions in the near future. This dramatic situation has created an opportunity where alternative energy solutions have started to find a market in the Gaza Strip introducing the benefit of solar energy for the production of electricity and the desalination of water. To support this new business growth, TVET institutions are encouraged to review the current programmes they offer to include these new skill requirements in their curricula.

⁵ Palestine Pulse “Restaurants on the Rise in Gaza”, <http://www.al-monitor.com/pulse/originals/2015/11/gaza-restaurants-increase-siege-ban-import-export.html>

CHAPTER 1

OPERATING ENVIRONMENT

The Gaza Strip is one of the most densely populated areas in the world, with more than 5,000 people per square kilometre. Over the past 10 years, the Gaza Strip has been suffering from an Israeli imposed blockade, political division and instability, the tunnels trade closure with Egypt and has witnessed three military assaults in 2008-2009, 2012 and 2014. The poverty levels in Gaza Strip have been worsening since 2006 due to the various political and socio-economic changes mentioned above. According to PCBS, the poverty rate in the Gaza Strip has been estimated at 38.3%, 38.0% and 38.8% in 2009, 2010⁶ and 2011⁷ respectively. Although no recent statistics have been released on the state of poverty in the Gaza Strip, the political and socio-economic changes mentioned above, especially the tunnels closure and the 2014 assault; have undoubtedly aggravated the poverty problem even further.

THE DEMOGRAPHY OF THE GAZA STRIP

The total population of the Gaza Strip has been estimated by PCBS at mid-2016 to be 1.88 million of which 956 thousand are males and 925 thousand are females. The population of the Gaza Strip in the age group of 15-29 years is estimated at 542,000 of which 275,000 males and 267,000 females. The age structure of the Palestinian society is young with the age group 0-14 years constituting 39.4% of the total population, 15-29 years constituting 30.0% of the total population whereas the age group 60 years and above constitute only 4.5%.⁸

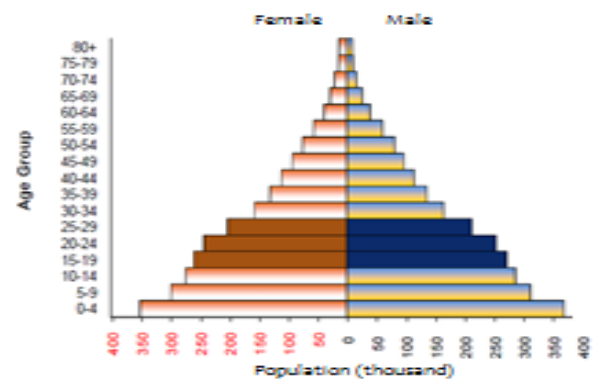


Figure 1: Population Pyramid in Palestine, Mid-2016

THE GAZA STRIP ECONOMIC ACTIVITY⁹

Real GDP in the Gaza Strip in the 1st quarter 2016 was 1.4% higher than in the 4th quarter 2015. Year-on-year growth rate accelerated in the Gaza Strip where the economy expanded by 21.1% as compared with 24.7% in the previous quarter. In the 1st quarter of 2016, the Gaza economy constituted about a third of the overall Palestinian economy, and the GDP per capita was about half of the West Bank's. The Gaza Strip witnessed significant expansion in the construction sector in the 1st quarter 2016 compared to the same period in 2015 with a growth rate of 190.2%. Significant growth was also recorded in the services sector at 17.8%, mining, manufacturing, electricity and water at 14.0%, financial and insurance activities at 12.9% and information and communication at 9.1%.

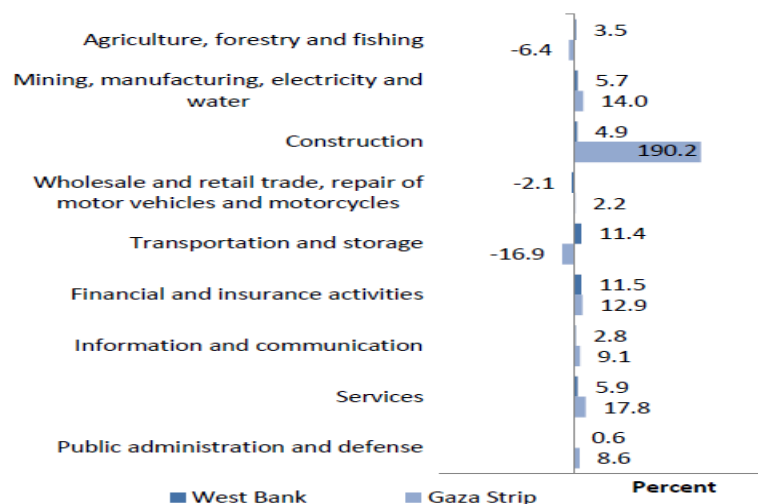


Figure 2: Rate of Change of Real Value Added by Economic Activity (year-on-year, q1/2016)

⁶ PCBS, "Poverty in the Palestinian Territory, 2009-2010", Press Release, 2011

⁷ PCBS, "Press Release on the Eve of the International Day of Refugees", June 2015

⁸ PCBS "Press Release on the Eve of the International Population Day", 11/7/2016

⁹ UNSCO, "Socio-Economic Report: Overview of the Palestinian Economy in Q1/2016"

THE GAZA STRIP LABOUR MARKET¹⁰

- 1) **LABOUR FORCE PARTICIPATION RATE:** According to PCBS April to June 2016 Labour Force Survey, the number of persons participating in the labour force in Palestine was 1,333,800 in the 2nd quarter 2016: 845,700 in the West Bank and 488,100 in the Gaza Strip. Table (1) below provides additional information on the Labour Force Participation in Palestine. The data shows a higher participation rate among females in the Gaza Strip compared to the West Bank with almost equal total labour force participation in both regions. Participation rate was highest in the age group 30-34 years in both the West Bank and the Gaza Strip at 69.3% and 61.4% respectively.

Region and Sex	Labour Force Status					
	Total		Outside Labour Force		In Labour Force	
	Percentage	Number	Percentage	Number	Percentage	Number
West Bank						
Male	100	935,900	27.6	257,900	72.4	678,800
Female	100	910,400	81.6	742,700	18.4	167,700
Total	100	1,846,300	54.2	1,000,600	45.8	845,700
Gaza Strip						
Male	100	542,200	31.2	169,100	68.8	373,100
Female	100	529,500	78.3	414,500	21.7	115,000
Total	100	1,071,700	54.5	583,600	45.5	488,100

Table 1: Labour Force Participation in Palestine – 2nd Quarter 2016

- 2) **UNEMPLOYMENT:** The number of unemployed in Palestine in the 2nd quarter of 2016 reached 358,700 of which 203,600 in the Gaza Strip and 155,100 in the West Bank. The unemployment rate in the Gaza Strip was 41.7% compared with 18.3% in the West Bank. Unemployment rate for males in Palestine was 22.1% compared with 44.7% for females. The highest unemployment rate among the different age groups in the 2nd quarter 2016 was 42.6% for youth aged 20-24 years with 30.2% in the West Bank and 61.9% in the Gaza Strip. Table (2) provides additional information on unemployment in the different age groups in both the West Bank and the Gaza Strip.

Age Group	Palestine	West Bank	Gaza Strip
15-19	37.1%	27.8%	58.0%
20-24	42.6%	30.2%	61.9%
25-29	37.6%	27.0%	53.5%
30-34	24.5%	16.6%	36.1%
35-39	15.9%	10.1%	25.7%
40-44	14.2%	8.7%	24.8%
45-49	12.8%	7.0%	24.7%
50+	13.8%	9.1%	24.9%
Total	26.9%	18.3%	41.7%

Table 2: Unemployment in Palestine by age and sex - 2nd Quarter 2016

For years of schooling, the highest unemployment rate was among females with 13+ years of schooling estimated at 50.9%. This was also the case in the West Bank with an unemployment rate of 24.4% in the same age group among females. In the Gaza Strip, the highest rate of unemployment among females was found among those with 1-6 years of schooling at 44.3%.

- 3) **EMPLOYMENT IN THE LOCAL MARKET:** The number of employed in the local market increased from 856,900 in the 1st quarter of 2016 to 859,400 in the 2nd quarter 2016. The number of employed persons in the local market in the West Bank increased by 7,000 while it decreased by 4,500 in the Gaza Strip. The services sector was the biggest employer in the local market with 31.9% in the West Bank and 55.5% in the Gaza Strip.
- 4) **EMPLOYMENT STATUS:** Around 68.8% of employed persons are wage employees: 64.8% in the West Bank compared with 78.5% in the Gaza Strip. 19.2% of employed persons are self-employed; 21.4% in the West Bank and 14.0% in the Gaza Strip. 5.8% of employed persons are unpaid family members; 6.4% in the West Bank and 0.2% in the Gaza Strip. 6.2% of employed persons are employers: 7.4% in the West Bank and 3.3% in the Gaza Strip.

¹⁰ Data in this section on the Labour Market is obtained from PCBS, Labour Force Survey, 2nd quarter 2016

CHAPTER 2

ASSESSMENT METHODOLOGY

Al Athar pursued realizing the LMNA study objective of identifying the most promising economic sectors related to TVET in order to expand youth employment and entrepreneurship opportunities in the Gaza Strip through pioneering the development of an assessment model “Employability Matrix” into which all gathered data from the various assessment tools fed. The assessment framework is built on a mixed approach, drawing where possible on available data combined with thorough analysis of quantitative and qualitative techniques. Figure (3) below presents the main activities linked to each stage of the assessment methodological framework.

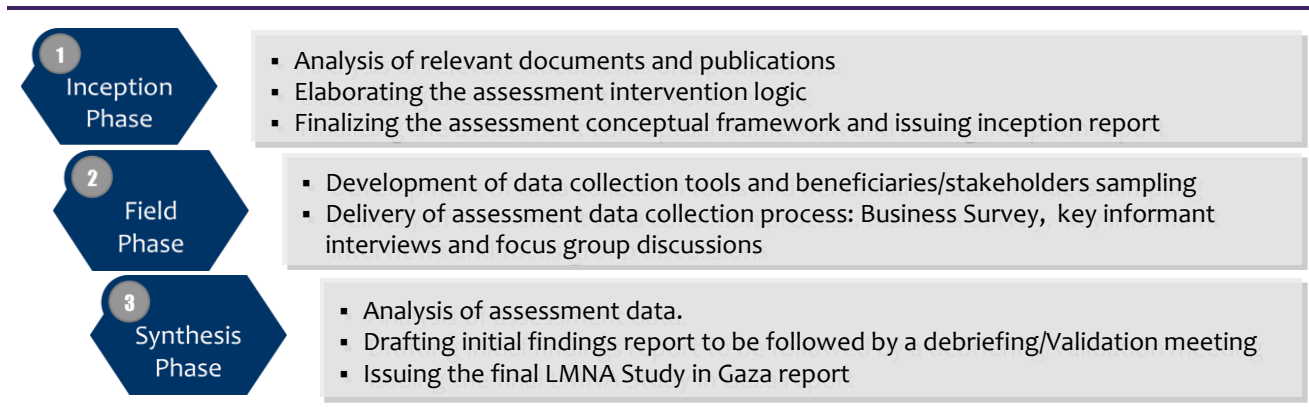


Figure 3: Assessment methodological framework

ASSESSMENT MODEL DESIGN CONSIDERATIONS

The design of the assessment model “Employability Matrix”, specially developed for this assignment, was built on the following considerations and rational:

- 1) Ensuring the credibility of the assessment model “Employability Matrix” through setting-up a technical reference group at the onset of the assignment. In close consultation with BTC Gaza Field Officer, Al Athar formulated a technical reference group comprised of representatives of: members of MoEHE, MoL, Islamic Relief Palestine TVET Programme, GIZ TVET programme and the local employment and TVET Council. The reference group is an integral part of the assessment design, methodological framework development (including the assessment key instrument) and most importantly validation of the assessment process as a measure for quality assurance.
- 2) As a pioneer effort by Al Athar, the assessment model “Employability Matrix” design was informed and supported by: (i) understanding and analysis of the ToR, including defined objectives for the study; (ii) previous working experience with labour market assessments methodologies and studies; (iii) analysis of several working modalities including international research, studies and tools used for assessing sectoral competitiveness and formulating strategies for economic development; (iv) understanding and analysis of published references on BTC’s WBL initiative; and most importantly (v) the technical discussions and outcomes of the inception meeting with key relevant stakeholders and assignment technical reference group.
- 3) Identifying a promising economic sector can be thought of as a system of related components that work together to achieve an agreed-upon purpose of expanding youth employment and entrepreneurship opportunities for TVET sector in the Gaza Strip. These five components are: (i) employability; (ii) TVET readiness; (iii) investment; (iv) market; and (v) insensitivity to external factors.
- 4) The assessment model “Employability Matrix” is designed to be used in its entirety, where each component is dependent on and shaped by the others. Within the Gaza context, it’s common for an economic sector to have different levels of performance across the five components. Therefore, the interdependency of the components means that for a specific economic sector to be identified as promising depends in part on balancing performance across components. Accordingly, results at the components level can be employed by development agencies in defining intervention areas and programming initiatives for advancing a specific sector.

- 5) Advised by PCBS definitions of the different economic sectors, the assessment team in close consultation with the assessment reference group identified 10 economic sectors to assess their potential for TVET employability. Two of the defined economic sectors were further divided into sub-sectors, namely: the Manufacturing sector and the Services sector. Table (3) below presents the assessed sectors and sub-sectors.

Economic Sector	Sub-sectors
Agriculture & Fishery	N/A
Manufacturing	Furniture
	Metal Works
	Food
	Textile, Garment & Leather
	Electrical Fixtures
Electricity, Gas, Steam and Air Conditioning	N/A
Construction	N/A
Motor Vehicles & Motorcycles Repair	N/A
Finance and Insurance	N/A
Information and Communication Technology	N/A
Services	Accommodation and Food Service
	Professional, Scientific and Technical Services
	Administrative and Support Services
Health and Social Work	N/A
Alternative Energy	N/A

Table 3: Assessment classification of economic sectors and sub-sectors

- 6) Market-driven approach that focused on demand aspect (needs of the labour market) so as to identify local opportunities for youth employment and entrepreneurship opportunities for TVET sector in the Gaza Strip that are relevant and rooted in the economic realities on the ground.
- 7) TVET related research is becoming a recognized and a highly pursued research field worldwide due to its prominent role as a viable alternative in aiding economic development. Still, in Palestine at large and in the Gaza Strip in particular, official primary data on TVET LMNA are scarce. Furthermore, in the event they exist, they are usually: (i) general and not TVET specific; (ii) methodological approaches focused on qualitative methods and hence are largely subjective; and (iii) do not offer a working modality that allows for comparison, tracking relative changes and trends spotting. The assessment model “Employability Matrix” is designed as a structured effort for setting a benchmark and enabling comparisons that can be used for programming.

EMPLOYABILITY MATRIX

Working in close coordination with the assignment reference group, the Employability Matrix comprise of five components which Al Athar defined as those representing core areas where an economic sector has to have positive performance in order to be a viable option for expanding youth employment and entrepreneurship opportunities for TVET sector in the Gaza Strip. As mentioned above, the five components are: (i) employability; (ii) TVET readiness; (iii) investment; (iv) market; and (v) insensitivity to external factors. Each component is measured through a number of variables and each variable in turn is measured through a number of indicators. The number of variables and indicators varies by component.

Weights and Scoring: Components and their corresponding variables are assigned weights that reflect their: (i) relative significance in influencing youth employment and entrepreneurship opportunities in the Gaza Strip; (ii) relative significance in shaping the performance across different economic sectors; and (iii) relative significance with respect to the other components and indicators. It is important to note that since the Employability Matrix is a new tool that was specifically developed by Al Athar for this assignment; the adopted weights and scoring were advised by extensive desk review of relevant studies and the assessment team experience working with the private sector. These weights were discussed and agreed upon with the assessment reference group. Furthermore, it was validated through the assessment qualitative field work that included interviews with key informants representing the TVET value chain and Focus Group Discussions (FGD) with various private sector representatives.

- **Variable score:** A variable score is obtained by: (i) adding the results of the various indicators associated with that variable, which are simply the questions in the business survey for that given variable; then (ii) multiplying the obtained result by the assigned weight for that variable.
- **Component:** A component score is obtained by adding the results of the various variables associated with that component. Accordingly, the individual scores of the various components can be used to determine priority needs for development.
- **Economic sector/sub-sector score:** An economic sector/sub-sector score is obtained by adding the results of the five components giving a “total” score of 100.

The components, the variables and their definitions as well as their associated weights are presented in Table (4) below.

Assessment Components/Variables	Definition	Weight
Component 1: Employability		40
Employability capacity	The current employment capacity for each of the identified sectors in terms of its capacity to generate new employment	5
TVET Employability Capacity	The current TVET employment capacity for each of the identified sectors	10
Diversity of Needed TVET Specialisations	Number of TVET specialisations needed in each sector/sub-sector	7
Skill Requirement	The entry level skill requirement for each sector/sub-sector	8
Business Technology	The level of current business technology/know-how in local production	5
Gender	The sector/sub sector employment in terms of gender disaggregation and women employment	5
Component 2: TVET Readiness		15
Readiness of TVET institutions	TVET institutions readiness to provide needed specialisations in terms of infrastructure, HR, curricula, etc.	9
Private Sector Perception of TVET institutions	The private sector perception of the capacity of TVET institutions in terms of curricula, staff, infrastructure and type of provided TVET programs and its relevance to the job market	6
Component 3: Investment		20
Investment Trend	Past investments made at the sector/sub-sector level (within the past three years)	7
Investment Potential	Potential investment opportunity at the sector/sub-sector level (within the coming three years)	10
Ease of Establishment	Private sector experience in establishing a new business at the sector/sub-sector level in relation to prevailing regulations	3
Component 4: Market		15
Competitiveness	The level of local production competition with other local and imported products at the sector/sub-sector level	5
Source of Input	The level of dependency on imported Vs. locally available raw material for production of goods and services	5
Product Market	The markets where locally produced goods and services are sold	5
Component 5: Insensitivity to external factors (within the current situation)		10
Insensitivity to Political Changes	Private sector sensitivity level to changes in political situation	3
Insensitivity to Economic Changes	Private sector sensitivity level to changes in economic situation	2
Insensitivity to Legal/Regulatory Changes	Private sector sensitivity level to changes in legal/regulatory environment	2
Insensitivity to Restrictions on Trade	Private sector sensitivity level to restriction on trade	3
TOTAL		100
Table 4: Employability matrix variable: definitions, indicators and weights		

ASSESSMENT TOOLS

The TVET LMNA utilized multiple tools (See ANNEX 04) in order to achieve the outlined objective, namely: (i) Private Sector Mapping exercise (qualitative); (ii) Business Survey tool (quantitative); (iii) Key Informant Interview (qualitative); and (iv) Focus Group Discussions (qualitative).

- **Private Sector Mapping exercise (qualitative):** The goal of this particular exercise was to map the private sector in general to identify economic sectors and specific firms and/or business in the Gaza Strip for engagement in the assessment. The assessment team built on its extensive working experience with the private sector and have referenced commonly used tools for business sector scan and private sector firm identification for generating the output of this mapping.
- **Business Survey tool (quantitative):** The study main tool which aimed to identify high potential growth sectors for expanding youth employment and entrepreneurship opportunities for TVET sector in the Gaza Strip through capturing local businesses' assessment with respect to the core areas for positive performance defined in the Employability Matrix. Given that targeted sectors (and subsectors where appropriate) of interest for this assessment were pre-identified, the business survey implementation process did not employ random sampling. Instead, the TVET LMNA aimed to target 120 business surveys. The assessment team was only able to fully complete 117 business surveys in spite of all invested efforts. (See ANNEX 03: List of consulted Businesses). The implementation phase commenced by a pilot conducted on July 11, 2016 for a sample consisting of 2 businesses (not included in the survey sample) from the manufacturing and the services sectors. The results of the pilot enabled testing the assessment assumptions and advised the finalization of the business survey form. Al Athar mobilized the fieldwork team comprised of six experienced surveyors. Each team member was assigned a specific number of businesses (on average 20 businesses/team member). The field team received a one-day training workshop on data collection techniques conducted in Al Athar office in Gaza on July 14, 2016. Completed survey forms were submitted on daily basis where they were reviewed against a pre-set completion and accuracy benchmarks which minimized data collection errors and incompleteness. Once the examination was completed, the surveys were submitted for data entry on daily basis using Excel programme which was also used for analysis.

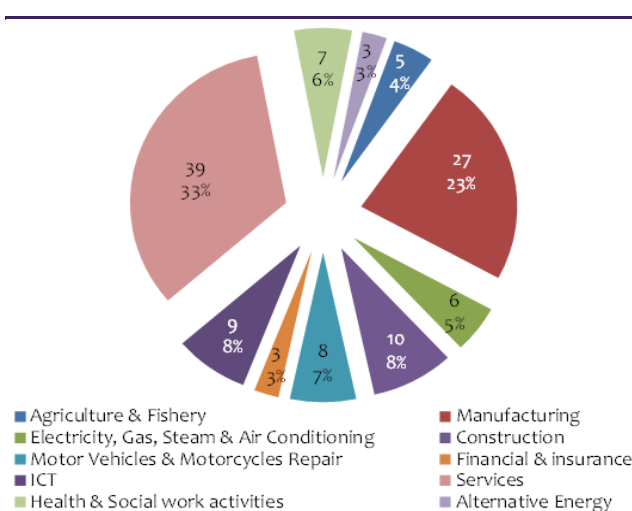


Figure 4: Distribution of reached sample of the targeted businesses by economic sector (n=117)

- **Key Informant Interviews (qualitative):** In order to gather rich, qualitative data on opportunities for expanding youth employment and entrepreneurship opportunities for TVET sector in the Gaza Strip, the assessment team developed tailored, supplemental Key Informant Interview questions that were administered to targeted stakeholders (defined in the assignment inception report). Based on availability, a total of 13 KIIs were held with a diverse group of stakeholders including: MoEHE, MoL, MoSA, University College Council of Churches, Palestine Technical College - Deir El Balah, Islamic Relief, GIZ, Palestinian Federation of Industries, Workers Syndicate, Gaza Chamber of Commerce and the Palestinian Agricultural Relief Committees. (See ANNEX 03: List of consulted individuals).
- **Focus Group Discussions (qualitative):** The main goal of the FGDs was to serve as a triangulation and validation process for the assessment outputs. A total of five FGDs with 34 participants (3 female and 31 males), were held with a diverse group of businesses representing different sectors, including: Industrial/ Manufacturing Sector, ICT Sector, Agriculture Sector, Services Sector as well as representatives of the local employment and TVET Council. (See ANNEX 03: List of consulted individuals).

ECONOMIC SECTORS AND SUB-SECTORS

As discussed in the Methodology Chapter, the assessment team identified 10 economic sectors to assess their potential for TVET employability using the Employability Matrix. Two of the 10 defined economic sectors were further divided into sub-sectors, namely: the Manufacturing sector and the Services sector. (Refer to Table 3: Assessment classification of economic sectors and sub-sectors on page 5 of this report).

OVERALL ASSESSMENT RESULTS AT THE SECTORAL LEVEL

Figure (5) presents the overall results of the assessment at the sectoral level. Overall, the assessment found that the services sector represents the highest employability potential scoring 55.37% followed by the agriculture and fishery and the ICT sector at 51.08% and 50.20% respectively. These sectors are known to be labour intensive which corresponds to the relatively high scores received for the main component “Employability” in the Employability Matrix. Furthermore, in comparison with other sectors, they were relatively less sensitive to be influenced by external factors and ranked among the highest in terms of investment and market. With that being said, the assessment identified TVET readiness (TVET institutions and private sector perception) among the key areas to be developed to enhance employability potential within these three sectors.

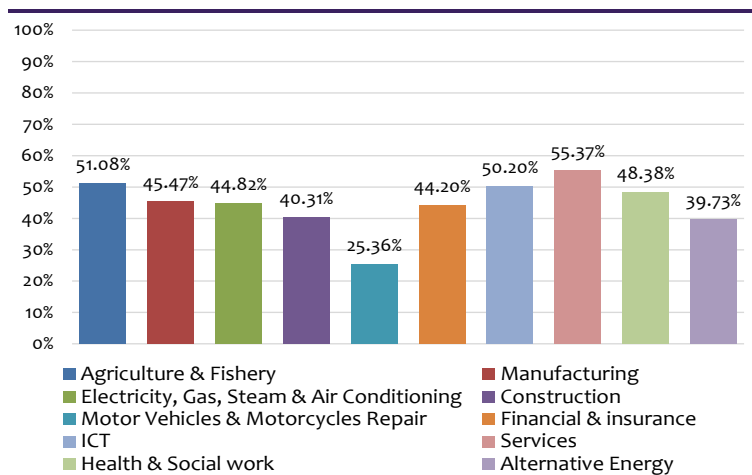


Figure 5: Overall results of the assessment at the sectoral level

The sector representing the lowest employability potential is the motor vehicles and motorcycles repair scoring 25.36%. This result could be attributed to the fact that most of the private sector entities engaged in activities within this sector are small workshops with low employment capacity and having low previous investment trend and potential. In addition, this sector ranked among the lowest in terms of TVET institutes readiness which could be attributed to the ability of TVET institutions and graduates to keep pace with the quick technological progress and sophistication in new motor vehicles. Table (5) illustrates the overall results of the assessment at the sectoral level with respect to the five defined assessment components. Each of the assessed sectors was given a score for the different assessment components. The higher the score, the more promising the sector is. The total score for each sector represents the summation of the different scores obtained for all five components.

Sector	Employability	TVET Readiness	Investment	Market	Insensitivity to external factors	TOTAL
	40	15	20	15	10	100
Agriculture & Fishery	19.47	8.37	11.07	6.40	5.78	51.09
Manufacturing	21.82	6.10	7.89	4.54	5.12	45.47
Electricity, Gas, Steam & Air Conditioning	20.24	4.58	10.72	3.79	5.48	44.81
Construction	17.62	7.02	7.03	3.19	5.46	40.32
Motor Vehicles & Motorcycles Repair	7.70	4.83	3.54	3.81	5.48	25.36
Finance & Insurance	19.97	6.33	2.92	9.38	5.60	44.20
Information & Communication Technology	22.41	4.37	9.92	7.82	5.69	50.21
Services	30.21	4.44	9.77	5.21	5.73	55.36
Health & Social Work	21.91	4.60	11.86	4.49	5.53	48.39
Alternative Energy	14.76	3.72	11.64	4.33	5.27	39.72

Table 5: Assessment overall results at the sectoral level with respect to the five defined assessment components

THE EMPLOYABILITY MATRIX VARIABLES

As the Employability Matrix is the main tool used to assess the most promising sector(s) in terms of their capacity to employ TVET graduates, this section presents the finding at the sector/sub-sector level in relation to the assessment's five components and each component subsequent variables.

A. EMPLOYABILITY: This component measures the performance of economic sectors/sub-sectors in terms of their employment capacity and their potential to generate new employment. Sectoral and Sub-sectoral results were generated based on six correlated variables, namely: (i) employment capacity; (ii) TVET employment capacity; (iii) diversity of needed TVET specialisations; (iv) skill requirements for TVET graduates to be employed by each sector/sub-sector; (v) the level of needed technology and know-how in the production of good and services and (vi) gender.

1. Employment Capacity

At the sectoral level, the assessment found that the three highest scoring sectors were: (i) health and social work scoring 4.64/5.0; (ii) electricity, gas, steam and air conditioning scoring 3.81/5.0; and (iii) service scoring 3.58/5.0. Given that the services sector has been divided into three sub-sectors, the administrative and support service sub-sector scored the highest (5.0/5.0) followed by the accommodation and food services sub-sector (4.54/5.0). The noteworthy finding here is that the administrative and support service is a growing employment sub-sector due to

a growing trend in outsourcing some of the main services performed by large private and non-private entities to external service providers such as accounting, marketing and promotion, activities coordination, event organizing, data entry, etc. Also, the assessment results revealed that this sub-sector holds high potential for entrepreneurship and innovative new businesses such as logistics and delivery service. Furthermore, the assessment revealed that this sub-sector includes economic activities that are socially acceptable for women and hence presents an area for growth potential for employment opportunities among them.

The three lowest scoring sectors were: (i) motor vehicles and motorcycle repair scoring 0.71/5.0; (ii) construction scoring 1.88/5.0; and (iii) alternative energy scoring 2.17/5.0. This could be attributed to the fact that the employment capacity was assessed for the past three years where the construction sector is suffering from restriction on importing building material, the alternative energy sector is a relatively new, yet growing sector showing promising potential for growth.

2. TVET Employment Capacity

At the sectoral level, the assessment found that the three highest scoring sectors were: (i) health and social work scoring 6.17/10.0; (ii) services 5.62/10.0; and (iii) electricity, gas, steam and air conditioning scoring 4.92/10.0. Within the services sector and at the sub-sector level, the administrative and support service scored the highest (10.0/10.0) followed by the accommodation and food services (6.24/10.0). It is important to note here that with the increased restrictions on movement of people, internal tourism is becoming popular in the Gaza Strip especially at the level of

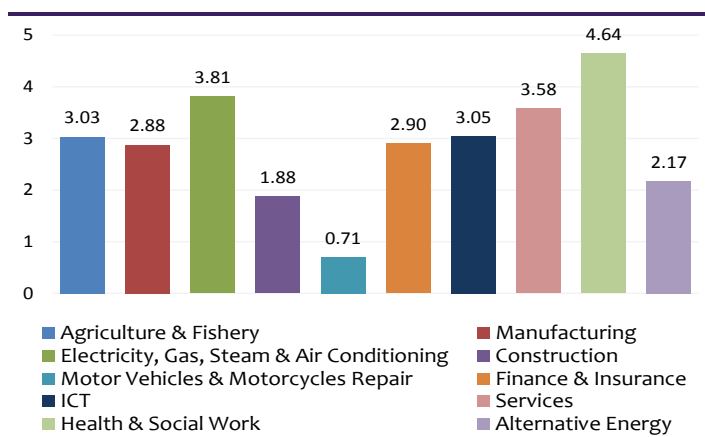


Figure 6: Assessment overall results at the sectoral level with respect to Employment Capacity variable

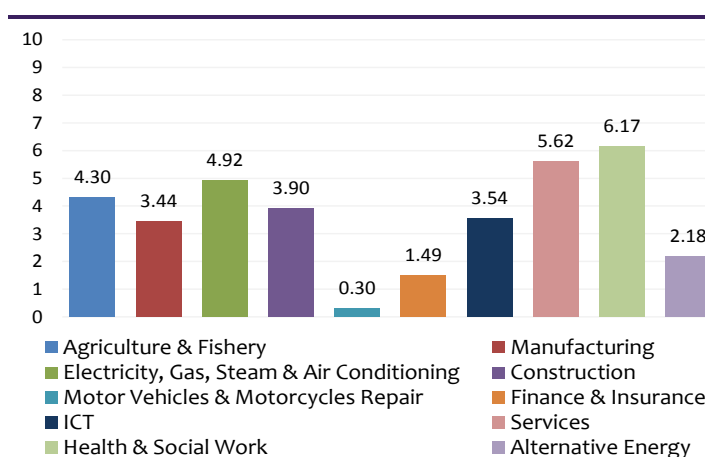


Figure 7: Assessment overall results at the sectoral level with respect to TEVET Employment Capacity variable

food and recreation. This trend presents an opportunity for TVET graduates employment that needs to be matched with the ability of TVET institutions to provide the needed number of skilled TVET graduates to meet the job market demand. *“One of the key challenges we face is the availability of skilled workers including waiters, head waiters and housekeeping staff. Skilled workers in this field are so scarce that we end-up competing for hiring the same people”.*

The three lowest scoring sectors were: (i) motor vehicles and motorcycle repair scoring 0.30/10; (ii) finance and insurance scoring 1.49/5.0; and (iii) alternative energy scoring 2.18/10.0. The finance and insurance sector rely more on university graduates rather than TVET graduates. As for alternative energy and as an emerging sector, needed specialisations or professions are not well defined within offered TVET specialisations. However, the assessment team foresee this sector as a potential sector for TVET institutions engagement which has been further validated by the vast majority of the key informant interview and FGDs participants during the assessment’s qualitative field work.

3. Diversity of Needed TVET Specialisations

The assessment found that most of the assessed economic sectors require a high diversity of TVET specialisations which indicate a good potential for TVET graduates employment.

Although few sectors scored low on this variable such as motor vehicle and motorcycle repair (3.61/7.0) which can be attributed to the small scale nature of the business as it does not require diversity in TVET specialisations and is focused on one or two specialisations that are usually performed by the same person. The relatively low score for the finance and insurance (4.13/7.0) and health and social work (4.72/7.0) can be attributed to the fact that both universities and TVET institutions offer similar specialisations that cater for these two sectors. Another contributing factor to this result is the fact that one of the key challenges facing TVET graduates’ employment is the competition with university graduates coupled with the image of TVET in the Gaza Strip. This has contributed to a lesser mention of TVET specialisation among the respondents of the business survey.

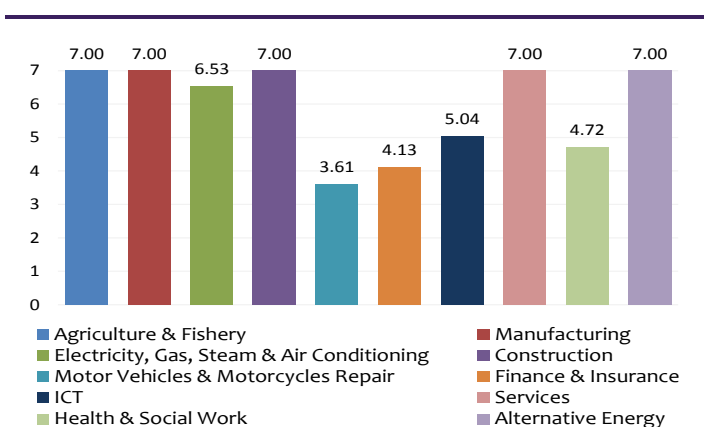


Figure 8: Assessment overall results at sectoral level with respect to Diversity of Needed TVET Specialisations variable

4. Skill Requirement:

At the sectoral level, the assessment found that the three highest scoring sectors were: (i) finance and insurance (6.33/8.0); (ii) services (6.23/8.0); and (iii) manufacturing (5.45/8.0). Within the services sector and at the sub-sector level, the professional, scientific and technical services scored the highest (1.82/8.0) while in the manufacturing sector the electrical fixtures sub-sector scored the highest (3.88/8.0).

The three lowest scoring sectors were: (i) health and social work (1.08/8.0); (ii) construction (1.95/8.0); and (iii) motor vehicles and motorcycle repair (2.49/8.0).

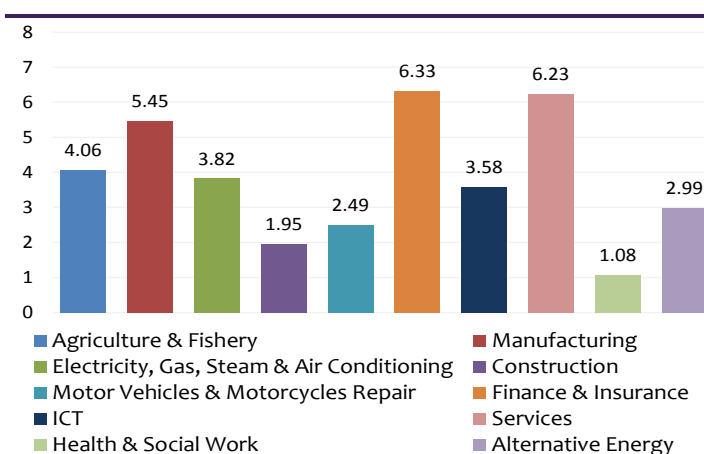


Figure 9: Assessment overall results at the sectoral level with respect to Skill Requirement variable

5. Business Technology

At the sectoral level, the assessment found that the three highest scoring sectors were: (i) ICT (5.0/5.0); (ii) services (2.78/5.0); and (iii) manufacturing (2.35/5.0). The ICT and manufacturing sectors are technology oriented sector while the services sector is both technology and new know-how oriented sector. Within the services sector and at the sub-sector level, the professional, scientific and technical services scored the highest at 1.62/5.0 while the highest scoring sub-sector within the manufacturing sector was the electrical fixtures (1.07/5.0).

The three lowest scoring sectors were: (i) agriculture and fishery scoring 0.13/5.0; (ii) finance and insurance scoring 0.13/5.0; and (iii) construction scoring 0.17/5.0.

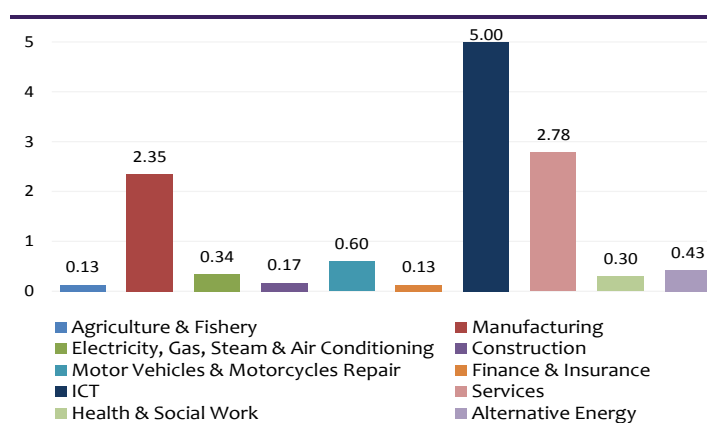


Figure 10: Assessment overall results at the sectoral level with respect to Business Technology variable

6. Gender

The assessment results were in line with the general employment conditions of women in the Gaza Strip where the traditionally socio-cultural acceptable sectors for women employment ranked the highest (5.0/5.0) such as: (i) health and social work; (ii) service; and (iii) finance and insurance.

On the other hand, traditionally socio-economic challenges to women's employment and integration into the labour market at large and the TVET sector in particular were evident in the sectors ranking the lowest such as: (i) manufacturing (0.70/5.0); and (ii) electricity, gas, steam and air conditioning (0.81/5.0). Also, the alternative energy and motor vehicle and motorcycle repair scored 0.0/5.0 as these sector included no women employment at all. The assessment team found the result for the motor vehicle and motorcycle repair to be justifiable given the nature of the business. As for the alternative energy, this result may be attributed to being a new sector that requires certain skills such as electrical technicians that are not usually provided by women.

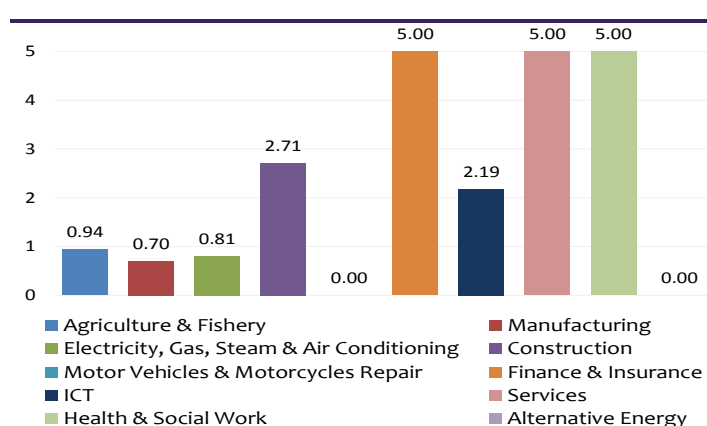


Figure 11: Assessment overall results at the sectoral level with respect to Gender variable

B. TVET READINESS: This component assesses TVET readiness in terms of private sector (i) willingness to hire TVET graduates and (ii) their perception of TVET institutions.

1. Readiness of TVET Institutions

At the sectoral level, the assessment found that the three highest scoring sectors were: (i) agriculture and fishery (4.5/9.0), construction (3.15/9.0) and finance and insurance (3.0/9.0). This could be attributed to the fact that these sectors are traditional economic sectors and TVET institutions have been graduating students for the job market. In addition, the skill level requirements by the private sector

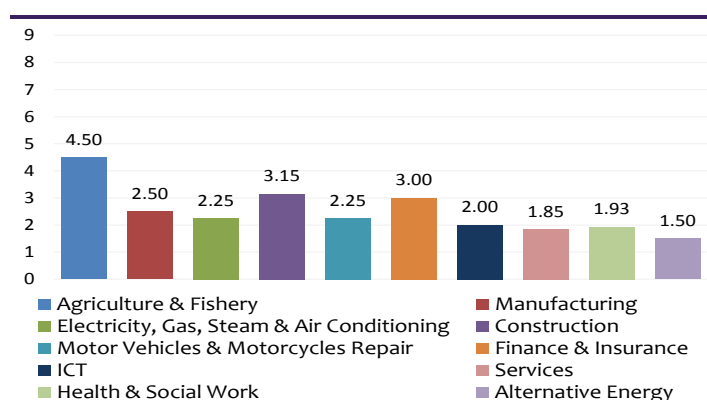


Figure 12: Assessment overall results at the sectoral level with respect to Readiness of TVET Institutions variable

have not changed a lot over the past few years. With that being said, it is important to highlight that fish farming is relatively a new area of agricultural practices that is showing an increased potential for growth especially within the context of the political constraints with regard to the Israeli restriction on fishing area in the Gaza Strip.

The three lowest scoring sectors were: (i) alternative energy (1.5/9.0), (ii) services (1.85/9.0); and (iii) health and social work (1.93/9.0). Given that the services sector has been divided into three sub-sectors, the administrative and support services was the highest performing sub-sector scoring (2.25/9.0). The alternative energy is a new business area with few TVET institutions offering programs to respond to the demand in the job market. With respect to the services sector, it is a growing and developing sector especially under the current political and economic conditions in the Gaza Strip. The services sector caters mainly to the local market with little dependence on imported goods for its operations. Therefore, it expanded to provide needed services (i.e. logistics, internal tourism, IT and administrative support, health related services) for a growing population. Therefore and from the perspective of the private sector, the TVET institutions ability to match this progress is an important area for intervention.

2. Private Sector Perception of TVET Institutions

At the sectoral level, the assessment found that the three highest scoring sectors were: (i) construction (3.87/6.0), (ii) agriculture and fishery (3.86/6.0) and (ii) manufacturing (3.6/6.0). Given that the manufacturing sector has been divided into five sub-sectors, electrical fixtures scored the highest (4.22/6.0). This again confirms the previous conclusion that traditional sectors have a higher regard to TVET institutions and graduates in comparison to the more technology oriented sectors. It is also noteworthy that the manufacturing sector has good relations with TVET institutions in terms of engagement in curricula review and provision of internship opportunities to TVET graduates.

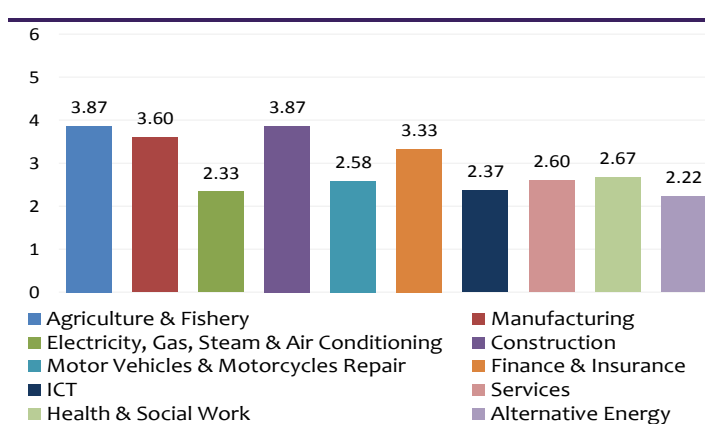


Figure 13: Assessment overall results at the sectoral level with respect to Private Sector Perception of TVET Institutions variable

The three lowest scoring sectors were: (i) alternative energy (2.22/6.0), (ii) electricity, gas, steam and air conditioning (2.33/6.0); and (iii) ICT (2.37/6.0). These are technology oriented sectors that demand a higher and different skill level than what is currently provided. Also from the perspective of the private sector employer, ICT TVET graduates are also competing with one of the highest graduating university specialisation. According to a participant from ICT FGD *“The TVET institutions readiness is weak and require modernization to follow the technological advancement in terms of curricula and teaching staff”*.

- C. INVESTMENT:** This component measures private sector previous and potential investment trends. Sectoral and Sub-sectoral results were generated based on three correlated indicators, namely: (i) Investment trend over the past three years; (ii) investment potential for the next three years; and (vi) private sector perception regarding the ease of establishment for new businesses.

1. Investment Trend

At the sectoral level, the assessment found that the three highest scoring sectors were: (i) electricity, gas, steam and air conditioning (4.67/7.0), (ii) agriculture and fishery (4.20/7.0) and (iii) services (3.05/7.0). Within the services sector and at the sub-sector level, administrative and support service scored the highest at (7.0/7.0). The electricity, gas, steam and air conditioning is catering for other growing sectors such as the alternative energy. It is also providing solutions to address the electricity problems in the Gaza Strip and is presenting several innovative and entrepreneurial opportunities in addressing this issue. Furthermore, the agriculture and fishery and services sectors' results are consistent with other assessment results that identified both as growing sectors over the past three years.

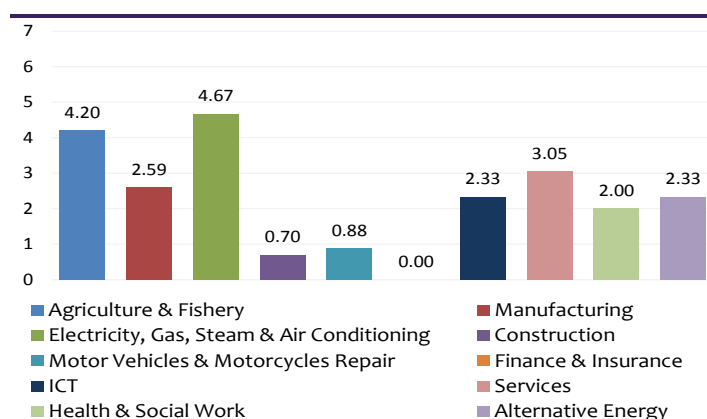


Figure 14: Assessment overall results at sectoral level with respect to Investment Trend over the past 3 years variable

The three lowest scoring sectors were: (i) finance and insurance (0.0/7.0), (ii) construction (0.70/7.0); and (iii) motor vehicles and motorcycle repair (0.88/6.0). It is worth noting that among the surveyed businesses, investment in the past three years was not limited to the business owner current sector of operation where 4.3% (5 out of 117) indicated investing in sectors other than their sector of current business operation. The majority (80% representing 4 out of 5) of those businesses came from the services sector especially the accommodation and food service activities sub-sector. Investments targeted: (i) food services (40%); (ii) alternative energy: solar energy (20%); (iii) ICT (20%); and (iv) furniture (20%).

2. Investment Potential

At the sectoral level, the assessment found that the three highest scoring sectors were: (i) health and social work (7.14/10), (ii) alternative energy (6.67/10) and ICT (5.00/10.0). The deteriorating health conditions and services has created an investment opportunity in the private sector making investing in the establishment of new hospitals and health care services among the highest investment potentials. The health and social work sector is a labour intensive sector and may present a high potential for TVET employment given that the quality and skill level of TVET graduates is competitive with university graduates. Due to the recent military offensives on Gaza, demand for social and health workers has increased for both TVET and university graduates. Only 0.9% (1 out of 117) of the surveyed businesses indicated that they intend to invest in the future in other sectors. The respondents came from the services sector and the intended investment is geared towards the ICT sector.

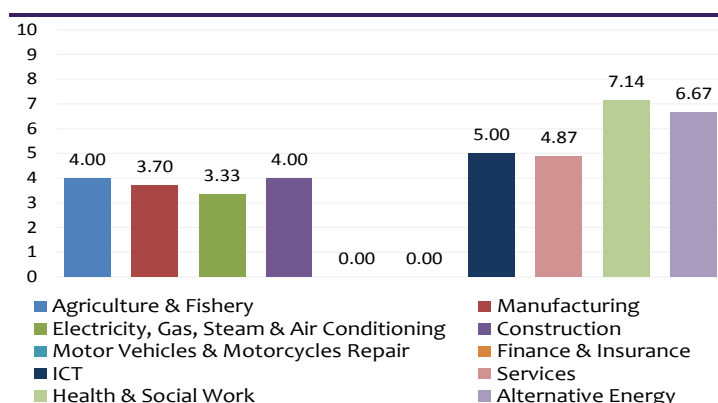


Figure 15: Assessment overall results at sectoral level with respect to Investment Potential over the next 3 years variable

On the other hand, both the motor vehicle and motorcycle repair and the finance and insurance showed no intention for making an investment in the future.

3. Ease of Establishment

At the sectoral level, the assessment found that the three highest scoring sectors were: (i) finance and insurance (2.92/3.0), (ii) electricity, gas, steam and (iii) air conditioning (2.72/3.0). Although the finance and insurance is a highly regulated sector, it is important to note that the vast majority of private businesses engaged in this sector have been established for a long time and those operating in Gaza are usually branches to either international firms or have their main office in the West Bank.

The three lowest scoring sectors were:

(i) manufacturing (1.59/3.0), (ii) services (1.85/3.0); and (iii) construction (2.33/3.0). The low score for the ease of establishment in manufacturing could be attributed to the increasingly strict regulation in the absence of proper industrial zones. The low score for the services sector especially those related to accommodation and food could be attributed to the additional licensing requirements compared to other business. The low score for the construction sector could be attributed to the need for obtaining a prior classification from the Palestinian Contractors Union in order to operate as a contractor which is an additional requirement compare to other business.

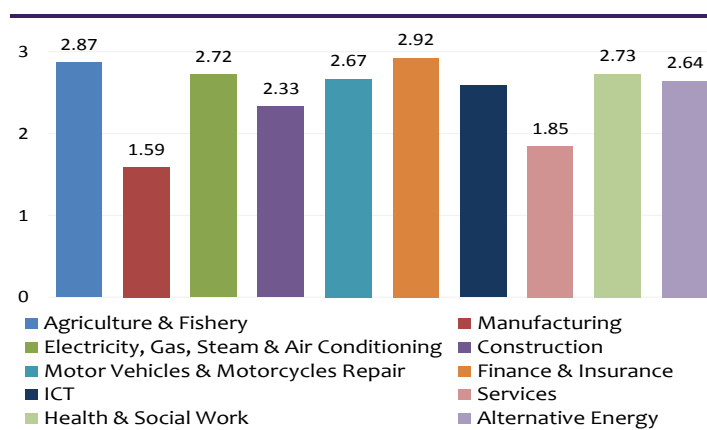


Figure 16: Assessment overall results at the sectoral level with respect to Ease of Establishment variable

D. MARKET: This variable assesses economic sectors/sub-sectors performance at the market level as identified by the private sector as those showing promising performances and are expected to further improve in the future. Sectoral and sub-sectoral results were generated based on three correlated market indicators, namely: (i) level of local production competition with other local and imported products; (ii) level of dependency on imported versus locally available raw material for the production of goods and services; and (iii) markets where locally produced goods and services are sold.

1. Competitiveness

At the sectoral level, the assessment found that the three highest scoring sectors were: (i) ICT scoring 3.82/5.0; (ii) health and social work scoring 3.49/5.0; and (iii) alternative energy scoring 3.33/5.0. These sectors face a relatively lower competition than other sectors under assessment due to the high demand on the provided services and products by these three sectors.

The three lowest scoring sectors were:

(i) finance and insurance scoring 2.04/5.0; (ii) construction scoring 2.19/5.0; and (iii) electricity, gas, steam and air

conditioning scoring 2.79/5.0. In the finance and insurance sector, there is high competition due to the limited market segment served by this sector. As for the construction sector and with the increased restrictions facing this sector, there is a high competition among existing businesses for a limited number of construction jobs. The electricity, gas, steam and air conditioning formal businesses face high competition from individual contractors (informal). With that being said and given the growing trend in this sector, the assessment team identifies this sector as a potential for entrepreneurial TVET employment.

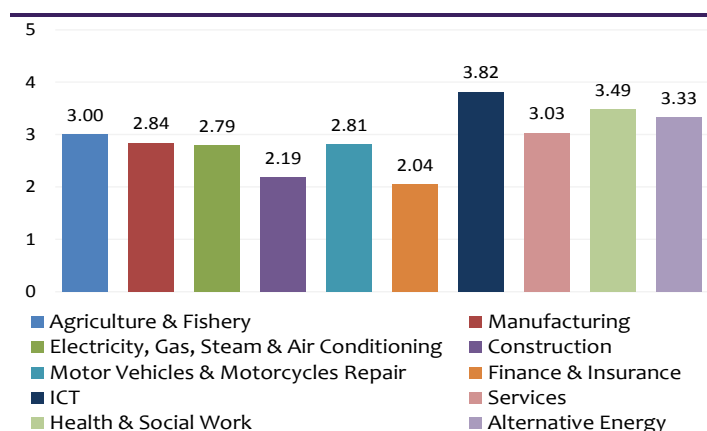


Figure 17: Assessment overall results at the sectoral level with respect to Competitiveness variable

2. Source of Input

Private sector operations are highly dependent on importing production inputs where minimal input material are available locally. Accordingly, 50% (5 economic sectors) were found totally dependent on imported inputs and hence scoring 0.0/5.0 under this indicator.

On the other hand, those sectors that use locally available inputs as part of their operation scored relatively high such as the finance and insurance (5.0/5.0) where provided services by this sector totally depend on local inputs. Similarly, the agriculture and fishery scored 2.0/5.0 as among the key inputs for its operations are locally available.

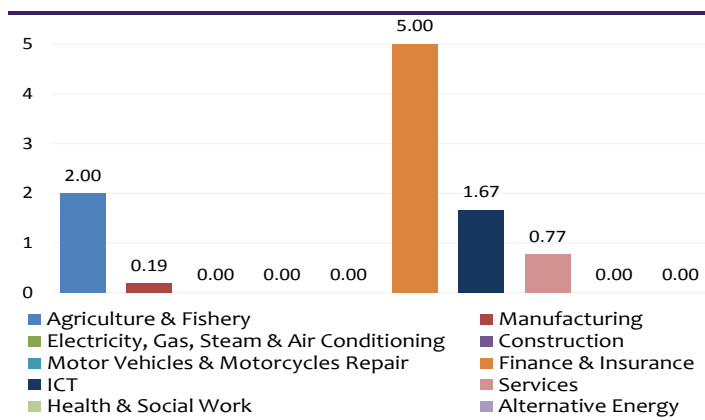


Figure 18: Assessment overall results at the sectoral level with respect to Source of Input variable

3. Product Market

Due to the current restrictions on trade in the Gaza Strip and the Israeli prolonged blockade, most of the private sector has a limited access to the export market and hence are highly dependent on the local market where 50% of the assessed sectors were found to be totally dependent on local market. With that being said, the three highest scoring sectors were (i) ICT scoring 3.34/5.0; (ii) finance and insurance scoring 2.33/5.0; and manufacturing scoring 1.52/5.0. The ICT sector is known to be least affected by restrictions on exports. The finance and insurance, as mentioned above, are mainly branches to international or companies located in the West Bank and hence have higher access to the export market. As for the manufacturing, the textile, garment and leather followed by the furniture scored 3.40/5.0 and 1.25/5.0 respectively were the highest scoring sub-sectors. Both sectors have witnessing some ease on exporting goods out of Gaza.

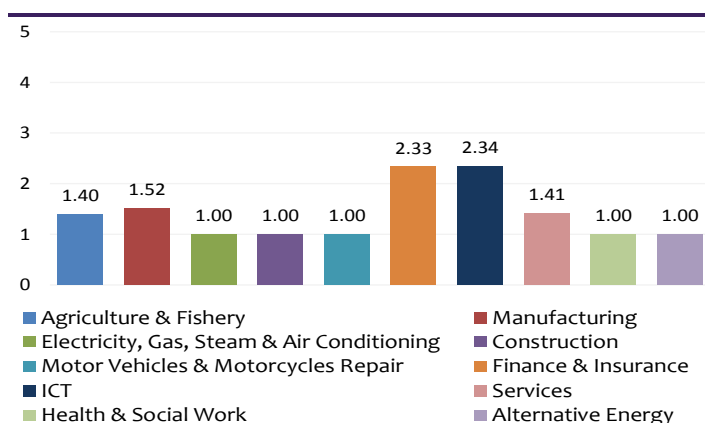


Figure 19: Assessment overall results at the sectoral level with respect to Product Market variable

E. INSENSITIVITY TO EXTERNAL FACTORS: This variable measures the resilience of the economic sectors/subsectors to the effects of a number of external factors that directly influence the operations of the private sector. Sectoral/Sub-sectoral results were generated based on four correlated indicators, namely: (i) political changes; (ii) economic changes; (iii) legal/regulatory changes; and (iv) restrictions on trade. Economic sectors/sub-sectors scoring high under this variable are considered more promising as they are less sensitive to external factors.

At the sectoral level, the assessment found that the three highest scoring sectors with respect to insensitivity to external factors were: (i) agriculture and fishery scoring 5.78/10.0; (ii) services scoring 5.73/10.0; and (iii) ICT 5.69/10.0. Given that the services sector has been divided into three sub-sectors, the accommodation and food services scored the highest in terms of insensitivity to external factors (8.38/10.0). On the other hand, the three lowest scoring sectors and hence are highly sensitive to external factors were: (i) manufacturing scoring 5.12/10.0; (ii) alternative energy scoring 5.27/10.0; and (iii) construction scoring 5.46/10.0. Within the manufacturing sector and at the sub-sectoral level, furniture (4.86/10.0) followed by electrical fixtures (5.10/10.0) were the most sensitive sub-sectors while metal works (5.12/10.0) was the least sensitive sub-sector to external factors.

At the indicators level: (i) The most sensitive sectors to political changes were finance and insurance and alternative energy sectors scoring 0.60/3.0 while the least sensitive sector to political changes was electricity, gas, steam and air conditioning scoring 1.80/3.0. (ii) The most sensitive sector to economic changes was motor vehicle and motorcycle repair scoring 0.15/2.0 while the least sensitive sector to economic changes was the agriculture and fishery sector scoring 1.28/2.0. (iii) The most sensitive sector to legal/regulatory changes was the manufacturing sector scoring 1.02/2.0 while the least sensitive sector to legal/regulatory changes was alternative energy scoring 1.47/2.0. (iv) The most sensitive sector to restrictions on trade was the construction sector scoring 1.68/3.0 while the least sensitive sector to restrictions on trade was finance and insurance scoring 3.0/3.0.

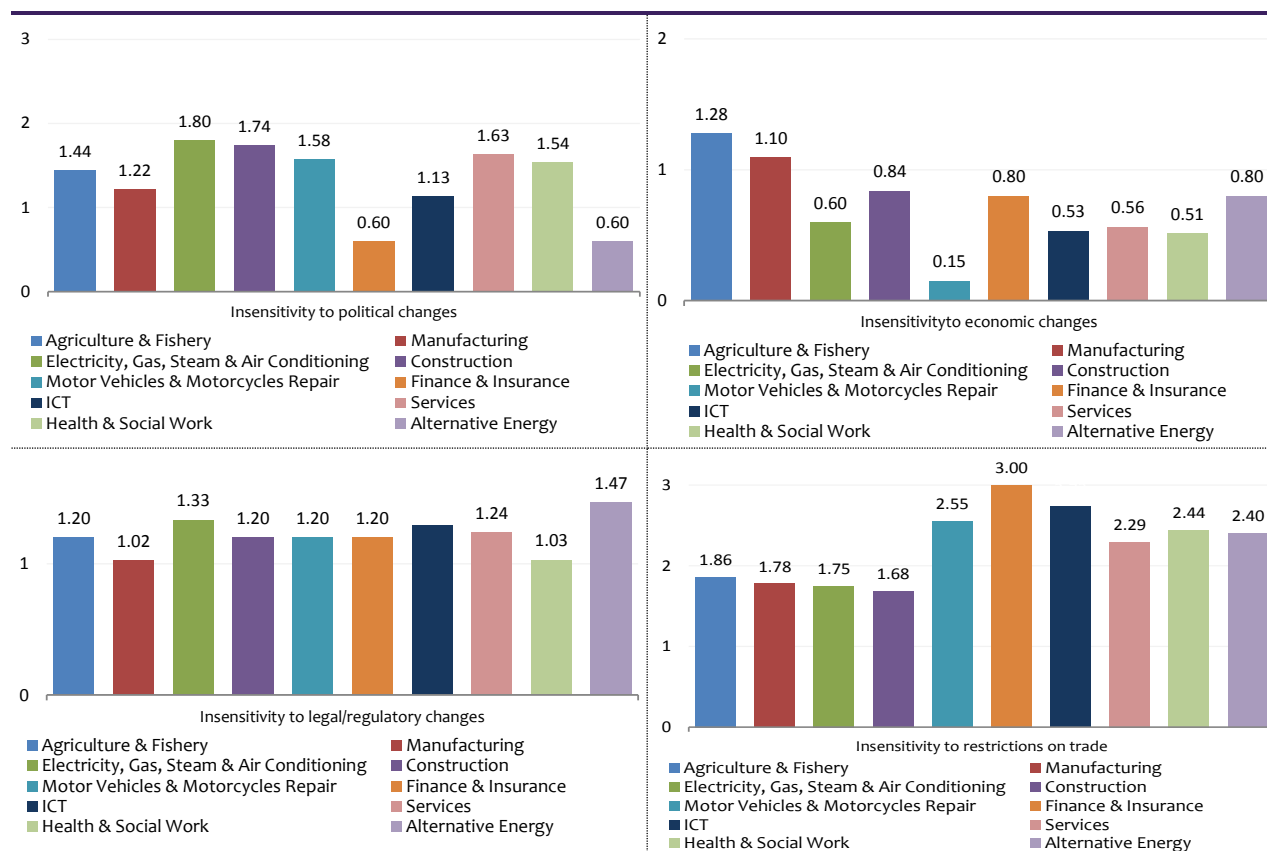


Figure 20: Assessment overall results at the sectoral level with respect to Insensitivity to External Factors variables

THE EMPLOYABILITY MATRIX SCORING

Sector/Subsector	Employability Variables																		TOTAL
	Employability						TVET Readiness		Investment			Market			Insensitivity to external factors				
	40						15		20			15			10				
	Employability Capacity	TVET Employability Capacity	Diversity of Needed TVET Specialisations	Skill Requirement	Business Technology	Gender	Readiness of TVET Institutions	Private Sector Perception of TVET Institutions	Investment Trend	Investment Potential	Ease of establishment	Competitiveness	Source of Input	Product Market	Insensitivity to Political Changes	Insensitivity to Economic Changes	Legal/Regulatory Changes	Insensitivity to Restrictions on Trade	
5	10	7	8	5	5	9	6	7	10	3	5	5	5	3	2	2	3	100	
Agriculture & Fishery	3.03	4.30	7.01	4.06	0.13	0.94	4.50	3.87	4.20	4.00	2.87	3.00	2.00	1.40	1.44	1.28	1.20	1.86	51.10
Manufacturing	2.88	3.44	7.00	5.45	2.35	0.70	2.50	3.60	2.59	3.70	1.59	2.84	0.19	1.52	1.22	1.10	1.02	1.78	45.47
Furniture	3.16	3.23	9.03	1.19	0.64	0.92	2.25	4.08	2.63	3.75	1.59	1.94	0.63	1.25	1.13	0.90	1.30	1.54	41.14
Metal Works	2.36	3.21	5.04	2.99	0.30	0.15	2.50	2.96	1.56	2.22	0.00	2.49	0.00	1.00	1.13	1.20	0.76	2.03	31.90
Food	2.96	2.48	12.38	2.66	0.09	2.70	2.25	4.00	3.50	5.00	0.00	3.75	0.00	1.00	1.80	1.20	0.60	1.65	48.01
Textile, Garment & Leather	2.65	3.69	6.60	2.26	0.26	0.94	2.70	3.47	2.80	4.00	0.00	1.92	0.00	3.40	1.68	1.12	1.12	1.56	40.16
Electrical Fixtures	3.99	5.18	6.19	3.88	1.07	0.00	3.00	4.22	4.67	6.67	0.00	3.67	0.00	1.00	0.60	1.20	1.20	2.10	48.63
Electricity, Gas, Steam & Air Conditioning	3.81	4.92	6.53	3.82	0.34	0.81	2.25	2.33	4.67	3.33	2.72	2.79	0.00	1.00	1.80	0.60	1.33	1.75	44.82
Construction	1.88	3.90	12.79	1.95	0.17	2.71	3.15	3.87	0.70	4.00	2.33	2.19	0.00	1.00	1.74	0.84	1.20	1.68	46.11
Motor Vehicles & Motorcycles Repair	0.71	0.30	3.61	2.49	0.60	0.00	2.25	2.58	0.88	0.00	2.67	2.81	0.00	1.00	1.58	0.15	1.20	2.55	25.36
Finance & Insurance	2.90	1.49	4.13	6.33	0.13	8.87	3.00	3.33	0.00	0.00	2.92	2.04	5.00	2.33	0.60	0.80	1.20	3.00	48.07
Information, Communication & Technology Services	3.05	3.54	5.04	3.58	5.17	2.19	2.00	2.37	2.33	5.00	2.59	3.82	1.67	2.33	1.13	0.53	1.29	2.73	50.37
Accommodation & Food Service	4.54	6.25	8.53	1.79	0.30	4.08	1.50	2.13	3.73	6.00	1.85	2.92	1.67	1.00	2.42	1.44	1.77	2.75	54.66
Professional, Scientific & Tech. Services	2.27	3.83	6.19	1.82	1.62	2.71	2.03	2.87	1.75	3.50	0.00	2.79	0.00	1.60	1.80	0.58	1.14	2.22	38.72
Administrative & Support Services	6.56	12.34	6.19	0.40	0.85	5.00	2.25	3.00	7.00	7.50	0.00	2.50	1.25	2.00	1.35	0.60	1.10	2.40	62.30
Health & Social Work	4.64	6.17	4.72	1.08	0.30	22.88	1.93	2.67	2.00	7.14	2.72	3.49	0.00	1.00	1.54	0.51	1.03	2.44	66.26
Alternative Energy	2.17	2.18	8.94	2.99	0.43	0.00	1.50	2.22	2.33	6.67	2.64	3.33	0.00	1.00	0.60	0.80	1.47	2.40	41.66



Conducting Labour Market Needs Assessment Study in the Gaza Strip

1. Introduction

The Enhancing Capacities for Institution Building (ECIB) program is funded by the Belgian Government and is implemented through cooperation between the Belgian Development Agency (BTC) and the Palestinian Ministry of Education and Higher Education (MoEHE) and the Ministry of Labour (MoL)

The ECIB program focuses on improving the qualitative and quantitative aspects of work-based learning practises of the technical and vocational education and training (TVET) programs in Palestine. The program is aligned to the national TVET strategy and the five-year plan of relevant ministries (MoEHE & MoL)

The key issues the ECIB program concentrates on are:

- **The 1st key issue: Apprenticeships, internships, scholarships, etc.:** The project will not be dependent on any strict definition of the above nor be limitative to either or; in general under “work-based learning” it is to be understood any kind of scheme facilitating the transition from school-to-work resulting in a trainee spending time at the work floor during or right after graduation, including informal apprenticeships and first employment promotion.
- **The 2nd Key issue TVET subsector:** The program focuses on the TVET sub-sector, including private sector providers, vocational training centres, over industrial schools to technical colleges at the higher education level. The program will not focus on academic (university) systems as such, but could be integrated or aligned to relevant administrative and management examples of similar schemes.
- **The 3rd key issue Capacity building:** The program aims to enhance the institutional capacity of the governmental and private sector institutions involved in technical and vocational skills development to allow them to facilitate, supervise and implement work based learning models at national, district and local level.
- **The 4th key issue: Gender and disadvantaged groups:** The program aims to open up educational and economic opportunities for youth from lower income families with a focus on pro-poor, pro-gender, environment friendly and pro-good governance orientations in program policies, selection process and selection criteria. Through attributing scholarships, the program seeks to pro-actively enhance the access to training and coaching of economically and socially disadvantaged learners.

2. Scope of work

The Labour Market Needs Assessment Study (LMNA) will be carried out as part of the design and implementation process of the WBL initiatives in partnership with TVET institutions to expand youth employment and entrepreneurship opportunities in the Gaza Strip. The assessment is considered a necessary starting point to ensure that the WBL initiatives are grounded in the current needs and aspirations of the Gazan youth as well as the demands of the local labour market.

The purpose of this assessment is to implement a succinct, short-term information-gathering effort, not to carry out a comprehensive national economic study. The focus of the study is to identify the most promising economic sectors related to TVET that enables TVET partners to upgrade or start new occupations that will meet labour market needs and priorities. BTC believes that the success of employability programs depends on correctly identifying and responding to the unique conditions of the local labour market in each targeted region, and tailoring those programs to the specific assets and needs of local youth. ECIB program which is aligned with market demands also add value for employers who will be more likely to hire and retain properly skilled TVET graduates and become long-term partners in training and support efforts.

3. Work Methodology

The study is expected to be a concrete baseline that gives numerical results and valid figures, indications, insights in and understanding of the economic sectors with a high potential of sustainable employment for youth in particular for those with a TVET background in the Gaza Strip. The research should be implemented by using the following methods of data collection and multi-methodological tools:

- Desk research: literature and relevant local and regional studies and documents review
- Survey: using close-ended questionnaires
- Key informant interviews
- Focus group discussion (FGD)

4. Tasks

1. Research methodology and tools

- Desk review of existing studies
- Prepare the methodology and tools
- Establish the sample frame for the research
- An Inception report including a detailed work plan, staffing plan, timing plan, and responsibility matrix

2. Data collection and entering

- Pre-test and possibly revise the tools
- Implement the survey
- Interview the key informants
- Enter data using the formats and generate agreed outcome tables

3. Data analysis and first assignment draft

- Process data using computer programs
- Analyse findings presented in outcome tables
- Produce the first draft report on assessment study

4. Final assignment report

- Facilitate a one-day stakeholder workshop on the study findings
- Prepare the workshop report & Revise report based on BTC comments
- Produce the final report

5. Deliverables

- Inception report includes a detailed work plan, staffing plan, timing plan, and responsibility matrix
- Analytical report highlighting the analysis framework of key indicators/signals
- Presentation of research findings
- The Table of contents and the results and findings
- A final report written in English. The main text of the reports will be prefaced with executive summary (2 to 4 pages), containing the main findings, conclusions and recommendations

6. Qualifications and experience

To carry out this assignment, the national consultant/s are expected to have the following key qualifications and experience: At least a master degree in social sciences (sociology), economics, or related field; & An in-depth understanding of the Palestinian labour market (At least one publication related to aspects of youth employment in Palestine); A demonstrated capacity to handle qualitative surveys and to analyse qualitative findings (at least 5 years of relevant experience); Excellent command of both English and Arabic

7. Time frame

The contract for the national consultant/s will run for the period of 2 months, after signature of contract.

8. Reporting

The lead consultant will be requested to produce and present the deliverables to ECIB team and work closely with BTC – Gaza field officer.

LIST OF CONSULTED DOCUMENTS

- 1) PCBS Labour Force Survey – Various Issues
- 2) PCBS National Accounts – First Quarter 2016
- 3) Randa Hilal “Labour Market Survey: Training Needs and VET Relevance Gaps’ Analysis”, 2013 with Support from the Belgian Development Agency.
- 4) PCBS “Areas of Study and Relationship to Labour Market of Individuals Aged 20-29 Years in 2014”, 1/7/2015
- 5) Palestinian Community Assistance Programme-Mercy Corps “Labour Market Needs Assessment, Gaza Strip”, April 2012
- 6) Palestinian Ministry of Labour “National Employment Strategy”, November 2010, with Support from the German Technical Cooperation
- 7) Palestinian Ministry of Education and Higher Education and Ministry of Labour “The TVET Strategy”, November 2010, with Support from the German Technical Cooperation
- 8) Islamic Relief – Palestine – Al-Sahel Consultants “Enhancing Youth Employability in the Gaza Strip, Pre-survey of stakeholders: Attitudes towards TVET in the Gaza Strip”, November 2013
- 9) Palestine League of Vocational Education and Training Association (VET-NGO League) “Regional Economic Status Report”, November 2010
- 10) International Development Holding Company, LLC (MTC) and General Consulting and Training (GCT) “Palestine Market Gap, Economic and Industry Cluster, and Private Sector Linkages” November 2010
- 11) Palestine League of Vocational Education and Training Association (VET-NGO League) “Gap Analysis Report”, April 2011
- 12) Optimum Consulting “Mainstreaming Gender Equality in Palestinian VET Centre: Needs Assessment – Labour Market Demand Main Findings and Recommendations Presented to ILO-MOL” was conducted by in 2009, under the MDG-F programme, supported by “Women’s Empowerment and Gender Equality in the oPt” funded by the Spanish Government.

LIST OF CONSULTED INDIVIDUALS AND BUSINESSES

S/N	Name of interviewee	Organization	Date of interview
Key Informant Interviewees			
1.	Mr. Said Jad El Haq	Ministry of Education and Higher Education	22/6/2016
2.	Mr. Mohammad Abu Hayya	Ministry of Labor	1/7/2016
3.	Mr. Ahmed El Najjar	Ministry of Labor	19/6/2016
4.	Mr. Mohammed Jondiya	Ministry of Social Affairs	26/7/2016
5.	Eng. Ahmed Kordia	University College	11/7/2016
6.	Mr. Mahmoud El Halimi	Council of Churches	16/6/2016
7.	Dr. Adnan Odwan	Palestine Technical College - Deir El Balah	27/6/2016
8.	Mr. Husam Joudah	Islamic Relief	27/6/2016
9.	Mr. Hazem El Mashharawi	GIZ	28/6/2016
10.	Mr. Khader Ishnawra	Palestinian federation of industries	22/6/2016
11.	Mr. Osama Kuhail	Workers Syndicate	29/6/2016
12.	Mr. Bassam Murtaja	Gaza Chamber of Commerce	16/6/2016
13.	Eng. Hani El Farra	Palestinian Agricultural Relief Committees	1/7/2016
Interviewees of Focus Group Discussion 01 with the Services Sector			
14.	Mr. Omar Al Ejla	Palestinian federation of industries	27/7/2016
15.	Mr. Abdelhalim Abdelatif	Palestinian Aluminum Industries Union	27/7/2016
16.	Mr. Ayman Abu Solila	Solila Dental and Medical Center	27/7/2016
17.	Mr. Emadeldi Al Khoudary	Biet Al Sharq for Beauty	27/7/2016
18.	Mr. Hussain Abu Eita	Abu Eita Company	27/7/2016
Interviewees of Focus Group Discussion 02 with the local employment and TVET Council			
19.	Ms. Nahla El Dwaiyk	Business Development Services	28/7/2016
20.	Mr. Samir Skaik	Palestinian Committee for Restaurants & Hotels	28/7/2016
21.	Mr. Salah Abu Hassira	Palestinian Committee for Restaurants & Hotels	28/7/2016
22.	Mr. Khiyri Shue'ib	UNRWA	28/7/2016
23.	Mr. Mahmoud Lubbd	Interpal-UK	28/7/2016
24.	Mr. Al Hasan Salama	CIS/Al Azhar University	28/7/2016
25.	Mr. Ihab Abu Zaietr	CIS/ Consultant	28/7/2016
26.	Mr. Mohammad Al Sisi	Palestinian federation of industries	28/7/2016
27.	Ms. Sonia Mansour	Arab College for Applied Science	28/7/2016
28.	Mr. Moatza Moshtaha	PITA	28/7/2016
29.	Mr. Hussain Abu Ghali	PITA	28/7/2016
30.	Mr. Ayman Abu Karim	Ministry of Labor	28/7/2016
Interviewees of Focus Group Discussion 03 with the ICT Sector			
31.	Mr. Fawaz Al Alami	Sidata	28/7/2016
32.	Mr. Khaled Abu Hasna	Vision Plus	28/7/2016
33.	Mr. Tarek Islem	Al Tareq Systems & Projects	28/7/2016
34.	Mr. Marwan Kuhail	Computer Land Company	28/7/2016
35.	Mr. Hasan Al Hussaini	Warehouse for Information and Technology	28/7/2016
Interviewees of Focus Group Discussion 04 with Industrial/ Manufacturing Sector			
36.	Mr. Jihad Abu Jahil	Mental & Engineering Industries Union	30/7/2016
37.	Mr. Mohammad Al Mansi	Mental & Engineering Industries Union	30/7/2016
38.	Ms. Sabrien Rayyan	Mental & Engineering Industries Union	30/7/2016
39.	Mr. Ziad Abu Owda	Palestinian Federation of Garment, Textile & Leather	30/7/2016
40.	Mr. Fouad Owda	Palestinian Federation of Garment, Textile & Leather	30/7/2016
41.	Mr. Nabil El Kourd	Palestinian Aluminum Industries Union	30/7/2016
42.	Mr. Sameer Al Qasas	Mental & Engineering Industries Union	30/7/2016
43.	Mr. Mostafa Al Zatma	Wood Industries Union	30/7/2016
44.	Mr. Moemen Zimo	Palestinian Federation of Industries	30/7/2016
Interviewees of Focus Group Discussion 05 with the Agriculture Sector			
45.	Mr. Ahmad Al Shafie	Gaza Agricultural Cooperative	4/8/2016
46.	Mr. Azzam Farahat	Al- Mawassi Agricultural Cooperative Association	4/8/2016
47.	Mr. Mohammad Khdair	Khdair Brothers Company	4/8/2016

S/N	Business Name	Sector: Sub-sector	Date of interview
1.	Khdeir Bros. for General Trade	Agriculture and Fishery <i>Total of 5 businesses</i>	17/7/2016
2.	Afana Company		16/7/2016
3.	Al Shikh Radwan Plant Nurseries		17/7/2016
4.	Al Jnadi Plant Nurseries		17/7/2016
5.	Al Bahar Fishery		19/7/2016
6.	Al Haj Zakki Al Amasi and Sons Company	Manufacturing: Furniture <i>Total of 8 businesses</i>	17/7/2016
7.	Bodrum for Cushioning		16/7/2016
8.	Zawaya Design		23/7/2016
9.	Qasr Al Issi Furniture Company		23/7/2016
10.	Majestic Company for General Trade and Industry		23/7/2016
11.	Al Tawil Furniture Company	Manufacturing: Metal Works <i>Total of 9 businesses</i>	16/7/2016
12.	Magic Touch for Engineering and Contracting		16/7/2016
13.	Irhaim Carpentry for Furniture		16/7/2016
14.	Al Haj Sha'ban and Sons for Metal Works		16/7/2016
15.	Ali Mousa Sha'ban and Sons for Metal Works		17/7/2016
16.	Modal Company for Trade, Industry & Contracting	Manufacturing: Food <i>Total of 2 businesses</i>	17/7/2016
17.	Al Helo Company for trade, Industry & Contracting		17/7/2016
18.	Al Mansi for Metal Work		18/7/2016
19.	Al Nashar Company for Metal Doors		18/7/2016
20.	Fawwaz Al Sa'di Stores for Jewellery		18/7/2016
21.	Al Hassanat for Metal Work	Manufacturing: Textile, Garment and Leather <i>Total of 5 businesses</i>	19/7/2016
22.	New Home Style Company		17/7/2016
23.	Al Madenna Copmany for Soft Drinks		23/7/2016
24.	Al Quds Snacks Store		23/7/2016
25.	Mohamad Abu Shanab Factory for Sewing		17/7/2016
26.	Fathi Awad Company	Manufacturing: Electric Fixtures <i>Total of 3 businesses</i>	22/7/2016
27.	Jaber Saleh for Textile		22/7/2016
28.	Marwan Jabr for Textile		19/7/2016
29.	Al Ostaz Company for Textile		17/7/2016
30.	Al Khozondar Company		21/7/2016
31.	Al Hadad Brothers Company	Electricity, Gas, Steam and Air Conditioning <i>Total of 6 businesses</i>	21/7/2016
32.	Abdelwahed Factory and Stores		21/7/2016
33.	Al Ghaseen Company for Gas, Trade and Industry		17/7/2016
34.	Al Hassayna Company for Public Safety		19/7/2016
35.	Al Mashharawi for Electromechanical & Engineering		17/7/2016
36.	Al Ishara Company	Construction <i>Total of 10 businesses</i>	16/7/2016
37.	Al Wafa Company		16/7/2016
38.	Al Saqa Company		18/7/2016
39.	Al Montar Company for Genera Trade		20/7/2016
40.	Skills and Quality Company Construction Company		15/7/2016
41.	Al Qawaleishi Company for Contracting & Trading	Motor Vehicles and Motorcycle Repair <i>Total of 8 businesses</i>	18/7/2016
42.	Mushtaha and Hassounah Company for Trading		18/7/2016
43.	Saqqa and Khoudary General Contracting Co. Ltd.		17/7/2016
44.	AL Qela' Company for General Contracting		17/7/2016
45.	Al Abneya Al Hadeetha for Contracting & Trading		18/7/2016
46.	Attallah Company for Contracting	Motor Vehicles and Motorcycle Repair <i>Total of 8 businesses</i>	17/7/2016
47.	Abu Eida Company for Contracting		17/7/2016
48.	Utopia Company for Engineering		17/7/2016
49.	Al Halees Company		19/7/2016
50.	Al Sawalhi Mechanic Workshop		17/7/2016
51.	Masoud Engineering Workshop	Motor Vehicles and Motorcycle Repair <i>Total of 8 businesses</i>	18/7/2016
52.	Shamalkh Workshop for Denting and Painting Cars		19/7/2016
53.	Abu Zour Workshop for Denting and Painting Cars		18/7/2016
54.	Ucas Workshop for Car Services		18/7/2016
55.	Hasan BdrEldien Workshop		17/7/2016
56.	Al Tawfiq Company for Motor Cycles		18/7/2016

S/N	Business Name	Sector: Sub-sector	Date of interview
57.	Al Waheed Exchange Company	Finance and Insurance <i>Total of 3 businesses</i>	17/7/2016
58.	Palestine for Credit and Development (FATEN)		17/7/2016
59.	Global United Insurance Company		17/7/2016
60.	Magic Tech. Company	Information and Communication Technology <i>Total of 9 businesses</i>	16/7/2016
61.	Al Quds Company for Information Technology		16/7/2016
62.	City Phone Company		16/7/2016
63.	Vision Plus Company		16/7/2016
64.	Bonat Al Tanmeya Company		17/7/2016
65.	Al Qana'a Company		18/7/2016
66.	Net Stream Company		19/7/2016
67.	Future Tech. Company		23/7/2016
68.	Modern Tech. Corps		24/7/2016
69.	Al Diera Hotel	Service: Accommodation and Food Services <i>Total of 15 businesses</i>	19/7/2016
70.	Al Shanti Express		16/7/2016
71.	Hadayana		16/7/2016
72.	Al Salam Restaurant (Abu Hasira)		16/7/2016
73.	City Stars Hotel		18/7/2016
74.	Safeer Al Hob Company		16/7/2016
75.	Al Taboon Restaurant		16/7/2016
76.	Roots Restaurant		19/7/2016
77.	Egypt Air Company		16/7/2016
78.	Masharq Company		18/7/2016
79.	Ameen Moshtaha Company		17/7/2016
80.	William Sbieh and Co. Company for polish		16/7/2016
81.	Accord Foundation to Facilitate		17/7/2016
82.	Al Nadi for General Services		18/7/2016
83.	Badri and Hania Company		24/7/2016
84.	German Medical Care	Service: Professional, Scientific & Technical Services <i>Total of 20 businesses</i>	16/7/2016
85.	Marcel Studio		16/7/2016
86.	Asayel Group		16/7/2016
87.	Al Jarrah Company for Printing and Investment		16/7/2016
88.	Qaraman Company		16/7/2016
89.	Solitare Copmany		16/7/2016
90.	Watanya Agency		19/7/2016
91.	Digital World for Satellites		18/7/2016
92.	Fadi Company		18/7/2016
93.	Dar Al Arqam Bookstore		17/7/2016
94.	Palestine Studio		17/7/2016
95.	Golden Bird Company		17/7/2016
96.	Sharp Company		16/7/2016
97.	TV Maintenance Center		16/7/2016
98.	Al Zant Company for Medical and Labs Devices		18/7/2016
99.	Evil Satellite		16/7/2016
100.	Alwan Studio		19/7/2016
101.	Rozy Beauty Center		18/7/2016
102.	Hala Abu Hasira Beauty Center		18/7/2016
103.	Talal Mourtaja Company		17/7/2016
104.	Al Khatieb Group	Service: Administrative and Support Service <i>Total of 4 businesses</i>	16/7/2016
105.	Al Yamamah for Logistic Services		17/7/2016
106.	Unit One Company		24/7/2016
107.	Interpal Company	Health and Social Work <i>Total of 7 businesses</i>	23/7/2016
108.	Gaza Diagnostic Center		18/7/2016
109.	Al Khateeb for Medical Analysis		17/7/2016
110.	Shaker Lab. For Medical Analysis		17/7/2016
111.	Future Magic Center		17/7/2016
112.	Public Aid Society		19/7/2016

S/N	Business Name	Sector: Sub-sector	Date of interview
113.	Dar Al Hekma	Health and Social Work	19/7/2016
114.	Dr. Hasan Salouha Clinic for Veterinary Medicine		23/7/2016
115.	Digital Zone Company	Alternative Energy <i>Total of 3 businesses</i>	16/7/2016
116.	Mega Power Company		16/7/2016
117.	Shams Al Nahar Company		16/7/2016

استبانة اصحاب العمل

نتيجة المقابلة النهائية		أبدي موافقتي على المشاركة والتي هي مشاركة طوعية وبإمكاني التوقف في أي وقت متى ما شعرت بعدم الراحة، وكل ما سيقال سيبقى خاصاً للدراسة وسيتم المحافظة على السرية.
1. أكتملت <input type="checkbox"/>	2. لم تكتمل <input type="checkbox"/>	
		<input type="checkbox"/> أوافق <input type="checkbox"/> لا أوافق

أولاً: بيانات تعريفية للاستثمار			
1.1	الرقم المتسلسل للاستثمار: <input type="checkbox"/>	1.2	اسم الباحث/ة:
1.3	تاريخ تعبئة الاستمارة: <input type="checkbox"/> - 07 - 2016	1.4	اسم المدخل/ة:
1.5	وقت تنفيذ الاستمارة: <input type="checkbox"/> : <input type="checkbox"/>	1.6	اسم المدقق/ة:

ثانياً: معلومات عامة	
2.1	اسم المنشأة:
2.2	القطاع الرئيسي: <input type="checkbox"/> القطاع الفرعي: <input type="checkbox"/>
2.4	موقع المنشأة الحالي: <input type="checkbox"/> الشمال <input type="checkbox"/> غزة <input type="checkbox"/> الوسطى <input type="checkbox"/> خانيونس <input type="checkbox"/> رفح
2.5	مكان المنشأة داخل المحافظة: <input type="checkbox"/> مدينة / بلدة <input type="checkbox"/> قرية <input type="checkbox"/> مخيم
2.6	سنة تأسيس المنشأة <input type="checkbox"/> 1987 وما قبل <input type="checkbox"/> 1988 - 1993 <input type="checkbox"/> 1994 - 2000 <input type="checkbox"/> 2001 - 2006 <input type="checkbox"/> 2007 وما بعدها
2.7	الشكل القانوني: <input type="checkbox"/> فردية (مشتغل مرخص) <input type="checkbox"/> شركة عادية <input type="checkbox"/> شركة مساهمة خاصة <input type="checkbox"/> شركة مساهمة عامة
2.8	هل المنشأة عائلية: <input type="checkbox"/> نعم <input type="checkbox"/> لا

ثالثاً: المكونات الخمس لمصفوفة التشغيل						
A: التشغيل (Employability)						
A.1	عدد فروع المنشأة: <input type="checkbox"/> بدون فروع <input type="checkbox"/> فرع واحد فقط <input type="checkbox"/> 2-3 فروع <input type="checkbox"/> أكثر من 3 فروع					
A.2	عدد العاملين الاجمالي حالياً في المنشأة:					
	<input type="checkbox"/> 5-1	<input type="checkbox"/> 10-6	<input type="checkbox"/> 15-11	<input type="checkbox"/> 20-16	<input type="checkbox"/> 25-21	<input type="checkbox"/> 30-26
A.2.1	منهم ذكور:		A.2.2		منهم إناث:	
A.3	عدد خريجي التعليم والتدريب المهني والتقني العاملين في المنشأة (يشمل الكليات):					
A.3.1	منهم ذكور:		A.3.2		منهم إناث:	
A.4	عدد خريجي التعليم والتدريب المهني والتقني حسب السنة (الحالي والمتوقع)					
	2013	2014	2015	2016	المتوقع 2017	المتوقع 2018

A.4	ما هي التخصصات (المطروحة ضمن القائمة) التي تتوافر في منشأتك					
A.5	في منشأتك، ما هي التخصصات الأربع الاعلى توظيفاً لديك من بين تخصصات التعليم والتدريب المهني والتقني (المطروحة ضمن القائمة)					
	A.5.1					
	A.5.2					
	A.5.3					
	A.5.4					
A.5.5	هل يوجد أي تخصصات أخرى (غير تلك المطروحة في القائمة): <input type="checkbox"/> نعم <input type="checkbox"/> لا					
A.5.6	إذا نعم، ما هي هذه التخصصات (مع تحديد اذا كان اي منها يمكن ان يستوعب إناث):					
A.6	ما احتياجات منشأتك من القوى العاملة من خريجي التعليم والتدريب المهني والتقني للسنوات الثلاث القادمة (المطروحة ضمن القائمة)					
	التخصص	العدد				
A.6.1		A.6.2				
A.6.3		A.6.4				
A.6.5		A.6.6				
A.6.7		A.6.8				

A.7		من وجهة نظرك، ما هي اهم اربعة تخصصات تعليم وتدريب مهني وتقني (المطروحة ضمن القائمة) يحتاجها سوق العمل في قطاع غزة في السنوات الثلاث القادمة وفي مجال عملك
A.7.1	A.7.2	تستوعب إناث <input type="checkbox"/> نعم <input type="checkbox"/> لا <input type="checkbox"/> لا أعرف <input type="checkbox"/>
A.7.3	A.7.4	تستوعب إناث <input type="checkbox"/> نعم <input type="checkbox"/> لا <input type="checkbox"/> لا أعرف <input type="checkbox"/>
A.7.5	A.7.6	تستوعب إناث <input type="checkbox"/> نعم <input type="checkbox"/> لا <input type="checkbox"/> لا أعرف <input type="checkbox"/>
A.7.7	A.7.8	تستوعب إناث <input type="checkbox"/> نعم <input type="checkbox"/> لا <input type="checkbox"/> لا أعرف <input type="checkbox"/>
A.7.9		هل يوجد أي تخصصات أخرى (غير تلك المطروحة في القائمة): <input type="checkbox"/> نعم <input type="checkbox"/> لا
A.7.10		إذا نعم، ما هي هذه التخصصات (مع تحديد اذا كان اي منها يمكن ان يستوعب إناث):
A.8		من وجهة نظرك، هل يوجد تخصصات تعليم وتدريب مهني وتقني (المطروحة ضمن القائمة) يحتاجها سوق العمل في قطاع غزة في السنوات الثلاث القادمة وخارج القطاع (الرئيسي و/أو الفرعي) الذي تعمل به:
A.8.1	A.8.2	تستوعب إناث <input type="checkbox"/> نعم <input type="checkbox"/> لا <input type="checkbox"/> لا أعرف <input type="checkbox"/>
A.8.3	A.8.4	تستوعب إناث <input type="checkbox"/> نعم <input type="checkbox"/> لا <input type="checkbox"/> لا أعرف <input type="checkbox"/>
A.8.5	A.8.6	تستوعب إناث <input type="checkbox"/> نعم <input type="checkbox"/> لا <input type="checkbox"/> لا أعرف <input type="checkbox"/>
A.8.7	A.8.8	تستوعب إناث <input type="checkbox"/> نعم <input type="checkbox"/> لا <input type="checkbox"/> لا أعرف <input type="checkbox"/>
A.8.9		هل يوجد أي تخصصات أخرى (غير تلك المطروحة في القائمة): <input type="checkbox"/> نعم <input type="checkbox"/> لا
A.8.10		إذا نعم، ما هي هذه التخصصات (مع تحديد اذا كان اي منها يمكن ان يستوعب إناث):
A.9	A.9.1	ما هي اكثر تخصصات التعليم والتدريب المهني والتقني في مجال عملك التي تحتاج الى تدريب عملي واكتساب خبرة قبل الانخراط في سوق العمل (المطروحة ضمن القائمة) مع الترتيب حسب الأولوية.
	A.9.2	
	A.9.3	
	A.9.4	
A.10		في رأيك، كم يحتاج خريج تخصصات التعليم والتدريب المهني والتقني الى وقت للعمل في القطاع الخاص بعد التخرج لاكتساب خبرة تمكنه من العمل بمهارة <input type="checkbox"/> من 1-3 اشهر <input type="checkbox"/> من 3-6 اشهر <input type="checkbox"/> من 6-12 شهر <input type="checkbox"/> اكثر من سنة
A.11		هل توافق على تدريب/تطوع طلاب وخريجي التعليم والتدريب المهني والتقني في منشأتك لإكسابهم المهارات والخبرات اللازمة لانخراطهم في سوق العمل؟ <input type="checkbox"/> موافق <input type="checkbox"/> محايد <input type="checkbox"/> لا اوافق
A.11.1		إذا كانت الاجابة موافق، كم العدد الممكن ان تستوعبه في منشأتك:
A.12	A.12.1	ما هي تخصصات التعليم والتدريب المهني والتقني (المطروحة ضمن القائمة) التي دخلت التكنولوجيا اليها بشكل كبير ويمكنها ان تتطور بالمستقبل من الناحية التكنولوجية
	A.12.2	
	A.12.3	
	A.12.4	
B. جاهزية التعليم والتدريب المهني والتقني (TVET Readiness)		
B.1		هل تفضل/ين توظيف خريجي/ات تعليم وتدريب مهني وتقني (يمكن أكثر من خيار): <input type="checkbox"/> افضل توظيف خريجي/ات تعليم وتدريب مهني وتقني حديثي التخرج <input type="checkbox"/> افضل توظيف خريجي/ات تعليم وتدريب مهني وتقني بشرط توافر خبرة متوسطة <input type="checkbox"/> افضل توظيف خريجي/ات تعليم وتدريب مهني وتقني بشرط توافر خبرة عالية <input type="checkbox"/> افضل مهني حاصل/ة على الخبرة من سوق العمل <input type="checkbox"/> لا يوجد لدي تفضيل
B.2		بشكل عام، ما هو رأيك في مؤسسات التعليم والتدريب المهني والتقني في قطاع غزة: <input type="checkbox"/> ممتازة وتقوم على تخريج مهنيين قادرين على العمل <input type="checkbox"/> جيدة ولكن بحاجة الى تطوير <input type="checkbox"/> ضعيفة وتحتاج الى تطوير <input type="checkbox"/> رديئة غير قابلة للتطوير
B.2.1		وفي حال الإجابة "جيدة ولكن بحاجة الى تطوير" او "ضعيفة وتحتاج الى تطوير"، الرجاء توضيح نواحي التطوير لتكون أكثر مواءمة لاحتياجات السوق (يمكن أكثر من خيار): <input type="checkbox"/> من ناحية المناهج التعليمية <input type="checkbox"/> من ناحية الكوادر التعليمية <input type="checkbox"/> من ناحية البنية التحتية (أجهزة، منشآت، مواد أولية) <input type="checkbox"/> من ناحية نوع التخصصات المطروحة (مدى مواكبتها لاحتياجات السوق التطويرية) <input type="checkbox"/> أخرى، حدد:
B.3		في حال وجود خريجي تعليم وتدريب مهني وتقني عاملين لديك، ما مدى رضاك عن ادائهم: <input type="checkbox"/> راضي جدا <input type="checkbox"/> راض <input type="checkbox"/> غير راض <input type="checkbox"/> لا ينطق: ليس لدي مهنيين
B.3.1		في حال الإجابة "غير راضي" او "لا يبطق"، الرجاء توضيح السبب:

C. الاستثمار (Investment)			
هل قمت بأي استثمار جديد في السنوات الثلاث الماضية (يمكن أكثر من خيار):			
C.1	<input type="checkbox"/>	نعم، في نفس قطاع العمل	<input type="checkbox"/>
	<input type="checkbox"/>	نعم، في قطاع آخر: الرجاء التحديد (من القائمة):	<input type="checkbox"/> لا
في حال نعم، هل ترتب على هذا الاستثمار زيادة في التشغيل (يمكن أكثر من خيار):			
C.1.1	<input type="checkbox"/>	نعم في نفس القطاع ومن خريجي التعليم والتدريب المهني والتقني	
	<input type="checkbox"/>	نعم في نفس القطاع ومن غير خريجي التعليم والتدريب المهني والتقني	
	<input type="checkbox"/>	نعم في قطاع آخر ومن خريجي التعليم والتدريب المهني والتقني	
	<input type="checkbox"/>	نعم في قطاع آخر ومن غير خريجي التعليم والتدريب المهني والتقني	
	<input type="checkbox"/>	لا	
هل تنوي القيام بأي استثمار جديد في السنوات الثلاث القادمة (يمكن أكثر من خيار):			
C.2	<input type="checkbox"/>	نعم، في نفس قطاع العمل	
	<input type="checkbox"/>	نعم، في قطاع آخر: الرجاء التحديد (من القائمة):	<input type="checkbox"/> لا
في حال نعم، هل سترتب على هذا الاستثمار زيادة في التشغيل (يمكن أكثر من خيار):			
C.2.1	<input type="checkbox"/>	نعم في نفس القطاع ومن خريجي التعليم والتدريب المهني والتقني	
	<input type="checkbox"/>	نعم في نفس القطاع ومن غير خريجي التعليم والتدريب المهني والتقني	
	<input type="checkbox"/>	نعم في قطاع آخر ومن خريجي التعليم والتدريب المهني والتقني	
	<input type="checkbox"/>	نعم في قطاع آخر ومن غير خريجي التعليم والتدريب المهني والتقني	
	<input type="checkbox"/>	لا	
C.3	C.3.1	أي من القطاعات الرئيسية (المطروحة ضمن القائمة) يمثل أعلى صعوبة في إنشاء منشأة أعمال	
	C.3.2		
	C.3.3		
	C.3.4		
C.3.5	ما هي هذه الصعوبات؟		
D. السوق (Market)			
D.1	ما هو مصدر المدخلات الرئيسية اللازم لعملك: <input type="checkbox"/> محلي <input type="checkbox"/> مستورد <input type="checkbox"/> محلي ومستورد		
D.2	ما هو السوق الذي تباع فيه منتجات/خدمات منشأتك (يمكن أكثر من خيار): <input type="checkbox"/> محلي: غزة فقط <input type="checkbox"/> محلي: الضفة فقط <input type="checkbox"/> دولي		
D.3	هل تعاني من منافسة مع منتجات أخرى مشابهة: <input type="checkbox"/> نعم، محلي <input type="checkbox"/> نعم، مستورد <input type="checkbox"/> نعم، محلي ومستورد <input type="checkbox"/> لا		
D.3.1	إذا كانت الإجابة نعم، الرجاء تحديد درجة تأثير المنافسة كنسبة (من 10-100 % بحيث 100% هي الأعلى):		
E. الحساسية للعوامل الخارجية (Insensitivity to external factors)			
E.1	ما هي درجة حساسية قطاع عملك للمتغيرات التالية (مع الترتيب)		
	الترتيب	نعم	
	E.1.2	<input type="checkbox"/>	E.1.1
	E.1.4	<input type="checkbox"/>	E.1.3
	E.1.6	<input type="checkbox"/>	E.1.5
	E.1.8	<input type="checkbox"/>	E.1.7
	E.1.10	<input type="checkbox"/>	E.1.9
رابعاً: ملاحظات واقتراحات:			

Assessment Components/Variables	Main Questions	KII				FDG	
		Public Sector Officials	TVET Institutions	TVET Programs	Private Sector Institutions	Private Sector Business	LET Council
Component 1: Employability							
Employability capacity	ما هو أكثر قطاع من قطاعات العمل الرئيسية يمكن ان يستوعب خريجي التعليم المهني؟ لماذا؟	•	•	•	•		
	ما هو أكثر قطاع فرعي لهذا القطاع الرئيسي يمكن ان يستوعب خريجي تعليم مهني؟ لماذا؟	•	•	•	•		
	ما هي نسبة العاملين المهنيين و التقنيين في القطاع من إجمالي العاملين؟					•	•
TVET employment in the private sector	كيف ترى الحاجة الى خريجي التعليم والتدريب المهني والتقني في قطاع غزة في هذا الوقت؟	•	•	•	•		
	هل ترى اي تغير في هذه الحاجة خلال السنوات الثلاثة الاخيرة؟ اذا نعم، ما هي اهم هذه التغيرات واسبابها؟	•	•	•	•		
	كيف يمكن زيادة دمج خريجي التعليم المهني والتقني في سوق العمل في القطاع الخاص؟ وعلى من تقع المسؤولية؟	•	•	•	•		
	ما هي نسبة تشغيل خريجي التعليم المهني في القطاع الخاص من إجمالي العاملين؟	•	•	•	•		
	ما هي نسبة العاملين المهنيين والتقنيين في القطاع من إجمالي العاملين؟					•	•
Diversity of needed TVET Specialties	ما هي التخصصات المطلوبة في سوق العمل في القطاع الخاص اكثر من غيرها من تخصصات التعليم المهني؟ لماذا؟	•	•	•	•		
	ما هو القطاع الفرعي الذي يحتاج الى اكبر عدد من التخصصات لاتمام العمل بشكل صحيح؟ وكم عددها	•	•	•	•		
Skill Requirement	هل تعتقد ان الخريج بمجرد تخرجه يمكن ان يتقن العمل؟ لماذا؟	•	•	•	•		
	ما هي المدة و الجهد التي يمكن أن تكلفها منشأة قطاع خاص للعمل مع خريجي التعليم و التدريب المهني في قطاع غزة				•		
	ما هي قطاعات العمل الفرعية التي تحتاج الى مهارات/معرفة عالية لكي يستطيع الخريج العمل بها بعد التخرج؟	•	•	•	•		
	كيف ترى الحاجة الى خريجي التعليم و التدريب المهني و التقني في قطاع غزة في هذا الوقت؟		•	•			
	ماذا تفعل الكلية/المعهد لتحديث المناهج وفقا لمتطلبات سوق العمل؟		•	•			
	ما هي اخر الجهود لتحديث المناهج لربطها بسوق العمل؟ و ما هي التخصصات التي تم الانتهاء منها؟		•	•			
	هل تقوم الكلية/المعهد بمتابعة الخريجين بعد التخرج لتوفير فرص عمل لهم؟ ما هو التخصص الاقل عدد من الخريجين العاطلين عن العمل؟		•	•			
	هل تقوم الكلية/المعهد بتطوير مهارات الخريجين بعد التخرج لربطها بسوق العمل؟ كيف؟		•	•			
	ما هي التخصصات التي تتوقع ان يكون عليها اعلى طلب من سوق العمل خلال السنوات الثلاث القادمة؟ لماذا؟		•	•			
	ما هي درجة المهارة المناسبة للخريج ليندمج في سوق العمل مباشرة بعد التخرج؟					•	
Business Technology	ما هي قطاعات العمل الفرعية التي تغلغت فيها التكنولوجيا بشكل واسع؟	•			•		
	ما هي قطاعات العمل المهنية التي اندمجت فيها التكنولوجيا بشكل كبير؟ و ما هي التي لم تتأثر بالتكنولوجيا		•	•			
	ما مدى تأثير التكنولوجيا و المعرفة الحديثة في قطاعكم؟					•	
Gender	من وجهة نظركم وخبرتكم، ما هي اكثر القطاعات عرضة للتأثر بالنوع الاجتماعي (ذكر، أنثى) في التوظيف؟ لماذا؟ كيف؟	•	•	•	•		•
	من وجهة نظركم وخبرتكم، ما هي اقل القطاعات عرضة للتأثر بالنوع الاجتماعي (ذكر، أنثى) في التوظيف؟ لماذا؟ كيف؟	•	•	•	•		•
	ما هي فرص تشغيل النساء في قطاعكم؟					•	

Assessment Components/Variables	Main Questions	KII				FDG	
		Public Sector Officials	TVET Institutions	TVET Programs	Private Sector Institutions	Private Sector Business	LET Council
Component 2: TVET Readiness							
Readiness of TVET institutions	ما هي التخصصات المهنية المجهزة لاستقبال الطلاب و تزويدهم بالمهارات اللازمة للعمل من ناحية البنية التحتية، المدرسين، المناهج، المعدات و الامكانيات، الصورة العامة للمعهد/الكلية؟ لماذا؟	•	•	•			
	ما هي التخصصات المهنية التي بحاجة الى تطوير لتناسب مع حاجة سوق العمل؟ لماذا؟	•	•	•			
	ما هي التخصصات المهنية التي يحتاج اليها سوق العمل وغير متوفرة في المؤسسات التعليمية؟ وماذا تحتاجون لتوفيرها؟	•	•	•			
	ما مدى جاهزية المؤسسات و/أو التخصصات المهنية الموجودة حاليا في قطاع غزة لتخريج أشخاص جاهزين للعمل في القطاع الخاص؟ ما هي أهم المميزات و/أو التحديات؟				•	•	•
Private sector perception of TVET institutions	وفق تجربتكم، ما هو انطباع القطاع الخاص نحو مؤسسات، تخصصات وخريجي التعليم المهني؟	•	•	•	•	•	
	ما هي التخصصات المفقودة و التي تعد من أحد المدخلات الأساسية في مجال عملكم؟ لماذا؟				•		
	ما هي أهم التوصيات العملية لتحسين فاعلية وجاهزية مؤسسات /تخصصات والخريجين في غزة للعمل في القطاع الخاص؟				•		
	النظرة السلبية، كيف يمكن أن نحولها إلي إيجابية و نعالج أسباب هذه النظرة						•
Component 3: Investment							
Investment Trend	ما هو القطاع الرئيسي والفرعي الاعلى نسبة استثمار خلال السنوات الثلاث السابقة؟ من قبل من؟ لماذا؟				•		
	من وجهة نظركم، اين كانت أكثر نجاحات الاستثمار (في اي قطاع رئيسي/فرعي)؟ لماذا؟				•		
	ما هو معدل الاستثمار في قطاعكم خلال الثلاث سنوات الأخيرة؟					•	
Investment Potential	ما هو القطاع الفرعي الذي تتوقع ان يكون حجم الاستثمار فيه اعلى من غيره خلال السنوات القادمة؟ من قبل من؟ لماذا؟				•		
	ما هو قطاع العمل الفرعي الذي تعتقد انه سوف يزيد الطلب عليه في سوق العمل خلال السنوات القادمة؟ لماذا؟				•		
	هل يوجد فرص استثمارية في قطاعكم خلال الثلاث سنوات القادمة؟ كم يبلغ معدلها ؟					•	
	هل تمثل الفرص الاستثمارية المستقبلية في القطاع الرئيسي أو الفرعي مؤشر لتطوير المؤسسات التعليمية و الخريجين						•
Ease of establishment	ما هي قطاعات العمل الاسهل في انشاء منشأة من ناحية الوقت، التكلفة و التراخيص؟ وما هي الاصعب؟				•	•	
	ما هي درجة صعوبة إنشاء منشأة جديدة في قطاعكم؟						
	علاقة سهولة إنشاء منشأة بالاستهداف للتطوير؟ و بتوجيه الخريجين نحو التشغيل الذاتي؟						•
Component 4: Market							
Source of Input	ما هو قطاع العمل الرئيسي و الفرعي الذي يواجه صعوبات و تحديات أكبر من غيره؟ و ما هي تلك الصعوبات و التحديات؟			•			
	ما هي قطاعات العمل الفرعية التي تعتمد بشكل كبير على المدخلات من اصل محلي؟ ا هي نسبة ما يعمل منها حاليا؟				•		
	ما هي قطاعات العمل الفرعية التي تعتمد بشكل كبير على مدخلات من اصل مستورد؟ ما هي نسبة ما يعمل منها حاليا؟				•		
	من وجهة نظركم , هل نشأ/ وقد ينشأ أعمال جديدة نتيجة توفر مواد خام محليا؟ ماذا وكيف؟				•		
	هل أغلب المدخلات لقطاعكم من مصادر خارجية؟					•	

Assessment Components/Variables	Main Questions	KII				FDG	
		Public Sector Officials	TNET Institutions	TNET Programs	Private Sector Institutions	Private Sector Business	LET Council
Product Market	ما هي القطاعات الفرعية التي تعتمد على السوق المحلي بالكامل؟ هل طرأ أي تغير على السوق خلال السنوات 3 الأخيرة؟ إذا نعم ما هي؟				•		
	ما هي القطاعات الفرعية التي تعتمد على التصدير؟ هل طرأ أي تغير على السوق خلال السنوات 3 الأخيرة؟ إذا نعم ما هي؟				•		
	ما هي القطاعات الفرعية التي تواجه أعلى نسبة منافسة مع المنتجات المستوردة؟ وما هي القطاعات التي لا تتأثر؟				•		
	هل معظم الأسواق المستهدفة لقطاعكم الخدمات تكون داخلية؟					•	•
Competitiveness	ما هو مدى استقرار مبيعات القطاع الفرعي في السوق المستهدف؟				•		
	هل طرأ أي تغيير على المبيعات في السوق المستهدف خلال السنوات 3 الأخيرة؟ إذا نعم، ما هي أهم هذه التغيرات؟				•		
	من وجهة نظركم، هل تتوقعون ظهور أسواق جديدة؟ ما هي؟ ولماذا؟				•		
	الحصة السوقية لقطاعكم من مصدر محلي أعلى من المصادر الخارجية؟					•	•
Component 5: Insensitivity to external factors							
Political changes	ما هي أكثر القطاعات عرضة للتأثر بالتغيرات السياسية؟ لماذا؟ كيف؟	•	•	•	•		
	ما هي أقل القطاعات عرضة للتأثر بالتغيرات السياسية؟ لماذا؟ كيف؟	•	•	•	•		
	مدى تأثير القطاع بالتغيرات السياسية؟ ما هي بالمقارنة مع القطاعات الأخرى؟					•	
Economic changes	ما هي أكثر القطاعات (الرئيسية، الفرعية) عرضة للتأثر بالتغيرات الاقتصادية؟ لماذا؟ كيف؟	•	•	•	•		
	ما هي أقل القطاعات (الرئيسية، الفرعية) عرضة للتأثر بالتغيرات الاقتصادية؟ لماذا؟ كيف؟	•	•	•	•		
	مدى تأثير القطاع بالتغيرات الاقتصادية؟ ما هي بالمقارنة مع القطاعات الأخرى؟					•	
legal/regulatory changes	ما هي أكثر القطاعات (الرئيسية، الفرعية) التي تتأثر بشكل كبير بالتشريعات، السياسات و لوائح تنظيم عمل القطاع؟	•	•	•	•		
	مدى تأثير القطاع بالتغيرات في اللوائح و القوانين؟ ما هي بالمقارنة مع القطاعات الأخرى؟					•	
	ما هي أقل (الرئيسية، الفرعية) القطاعات التي تتأثر بشكل كبير بالتشريعات، السياسات و لوائح تنظيم عمل القطاع؟	•	•	•	•		
	مساهمة مجلس التشغيل في تثبيت اللوائح و القوانين لصالح القطاعات؟						•
Restrictions on trade	ما هي أكثر القطاعات (الرئيسية، الفرعية) عرضة للتأثر بالقيود المفروضة على التجارة وسياسة الحصار؟ لماذا؟ كيف؟	•	•	•	•		
	ما هي أقل القطاعات (الرئيسية، الفرعية) عرضة للتأثر بالقيود المفروضة على التجارة وسياسة الحصار؟ لماذا؟ كيف؟	•	•	•	•		
	مدى تأثير القطاع بسياسات الاستيراد؟ ما هي بالمقارنة مع القطاعات الأخرى؟					•	
	مدى تأثير القطاع بسياسات التصدير؟ ما هي بالمقارنة مع القطاعات الأخرى؟					•	

Al Athar Global Consulting, Inc.

Bakri Tower – 13th Floor

Al Mina Square - Gaza, Palestine

Telfax: +970 (or 972) 8-288-3377

www.athar.ps

consult@athar.ps