



A Year of War in Gaza: Impacts on Employment and Livelihoods in the West Bank and Gaza Strip:

Bulletin No. 5

### October 2024

### **Key points**

- ► The war in Gaza, now entering its second year, continues to have devastating repercussions on the economy and labour market across the OPT.
- ▶ The economic cost has been immense, with real GDP in the OPT declining by 32.2 per cent over the past year; the West Bank saw a contraction of 21.7 per cent, while the Gaza Strip experienced a staggering drop of 84.7 per cent.
- ▶ Value added in "Construction" and "Manufacturing, mining, water and electricity" sectors dropped by 47.3 per cent and 35.4 per cent respectively, driven by uncertainty and restrictions on labour and material movement, while the "Information and communication services" sector, typically relatively resilient during wars, declined by 18.5 per cent.
- ▶ The economic downturn has severely undermined living standards, with real GDP per capita dropping by 33.4 per cent across the OPT. In the Gaza Strip, per capita GDP plunged by 84.9 per cent, while in the West Bank, it decreased by 23.4 per cent. Gaza's per capita GDP now stands at just 5.2 per cent of that in the West Bank.
- ▶ The labour market has borne the brunt of the war, with the unemployment rate in the OPT surging to 51.1 per cent, reaching 34.9 per cent in the West Bank and 79.7 per cent in the Gaza Strip. Total unemployment averaged 734,685 over the past year, marking an increase of 363,213 compared to the previous year.

- While most job losses led to unemployment, some individuals left the labour force altogether. Labour force participation rates in the OPT declined from 45.2 per cent in the pre-war period, October 2022 September 2023, to an average of 43.5 per cent during the war year.
- ▶ In the West Bank, the war has taken a severe toll on men, with employment plummeting by more than 28 per cent, unemployment tripling, and inactivity levels rising by 12.3 per cent. This was largely due to job losses incurred by the more than 150,000 Palestinian men formerly employed in Israel. While women have faced fewer job losses, concerns persist regarding their already low employment and participation rates, the challenges they face in terms of working conditions and exposure to exploitation, as well as the difficulties of reintegrating into the labour market.
- ▶ Amid widespread job losses and rising prices, real daily wages in the West Bank have fallen, with men facing a steeper decline, again largely due to significant job losses in the Israeli labour market. Despite this, the gender pay gap persists, with women earning 19 per cent less than men.
- ➤ To pave the way for a sustainable recovery, an immediate cessation of war is essential, facilitating a "building forward better" approach that prioritizes infrastructure development through employment-intensive infrastructure, decent job creation, skills development and inclusive economic support.

<sup>&</sup>lt;sup>11</sup> This fifth technical bulletin, prepared by the International Labour Organization (ILO) in collaboration with the Palestinian Central Bureau of Statistics (PCBS), provides an updated assessment of the ongoing war's impact on the economy and labour market in the Occupied Palestinian Territory (OPT). The analysis is based on descriptive analysis of available secondary data and forecasting model simulations derived from the econometric model developed by PCBS, ILO, and MAS in 2018. Unless otherwise stated, figures and estimates for the West Bank and the OPT more generally do not include East Jerusalem, for which data are not available.

### Overall situational update

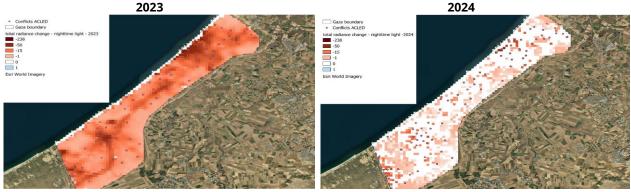
The ongoing war has significantly affected livelihoods and infrastructure in both the Gaza Strip and the West Bank. As of September 30, 2024, the Ministry of Health in Gaza reports more than 41,615 Palestinians killed and 96,359 injured in the Gaza Strip.<sup>2</sup> The war has resulted in a significant increase in civilian casualties, including women and children. The scale of devastation has been profound, with more than 1.9 million individuals displaced and over 70,000 housing units destroyed, leaving countless families homeless and increasingly vulnerable.<sup>3</sup>

According to the United Nations Satellite Centre (UNOSAT), 66 per cent of all structures in the Gaza Strip have sustained damage, totalling 163,778 structures. This figure includes 52,564 structures that have been completely destroyed, 18,913 that have been severely damaged, 35,591 that are possibly damaged, and 56,710 that have been moderately affected. The extensive damage to residential, commercial and other types of structures further exacerbates the already dire humanitarian situation, complicating future recovery efforts and restricting the delivery of and access to essential services.

The war's impact extends far beyond immediate humanitarian concerns and physical destruction; it fundamentally alters the socio-economic landscape of the Strip. The cessation of most economic activities in Gaza has resulted in drastically reduced livelihood opportunities, soaring unemployment rates and widespread economic despair. The recurring displacement of workers and employers and the destruction of means of production have made it nearly impossible to sustain economic activity, leading either to complete cessation of work or to a predominance of informal and irregular work, primarily centered on the provision of essential goods and services.

Figure 1 below depicts the change in nighttime lights observed in the Gaza Strip in 2023 and 2024. Used as a proxy for measuring change in economic activity, the sharp decline in nighttime lights in 2023 reflects a significant shrinking of economic output and severe consequences for both workers and enterprises in the Strip. By 2024, as the war persists, reductions in nighttime lights continue, though less significant than in 2023, since much of the initial damage and disruption occurred the previous year.





Source: This work is based on all available 15 arc-second spatial resolution daily DNB atmospheric and lunar DRBF corrected Black Marble NTL radiance (VNP46A2) collected for the period 2012- (16 October) 2024. The NTL change detection is based on the methodology proposed in Tian et al. (2022).<sup>56</sup>

<sup>&</sup>lt;sup>2</sup> <u>Humanitarian Situation Update #224 | Gaza Strip | United Nations Office for the Coordination of Humanitarian Affairs - occupied Palestinian territory (ochaopt.org)</u>

<sup>&</sup>lt;sup>3</sup> United Nations Office for the Coordination of Humanitarian Affairs - occupied Palestinian territory | Home Page (ochaopt.org)

<sup>&</sup>lt;sup>4</sup> 66% of the total structures in the Gaza Strip have sustained damage, UNOSAT's analysis reveals | UNITAR

<sup>&</sup>lt;sup>5</sup> Román, M.O., Wang, Z., Sun, Q., Kalb, V., Miller, S.D., Molthan, A., Schultz, L., Bell, J., Stokes, E.C., Pandey, B. and Seto, K.C., et al. (2018). NASA's Black Marble nighttime lights product suite. Remote Sensing of Environment 210, 113-143. doi:10.1016/j.rse.2018.03.017.

<sup>&</sup>lt;sup>6</sup> Tian Li, Zhe Zhu, Zhuosen Wang, Miguel O. Román, Virginia L. Kalb, Yongquan Zhao, 2022. *Continuous monitoring of nighttime light changes based on daily NASA's Black Marble product suite*. Remote Sensing of Environment, Vol. 282, 113269, https://doi.org/10.1016/j.rse.2022.113269.

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Alongside diminished incomes, Gazans have grappled with increasing prices, with year-on-year inflation reaching 248 per cent in August 2024.<sup>7</sup> This surge in prices has severely eroded individuals' purchasing power, making it increasingly difficult for them to meet even their most basic needs.

The situation in the West Bank has been equally concerning, with 693 Palestinians killed since the outbreak of the war. Furthermore, between October 7, 2023, and September 23, 2024, the UN Office for the Coordination of Humanitarian Affairs (OCHA) reported approximately 1,390 attacks by settlers have led to the displacement of 277 Palestinian households across the region. During the same period, 1,725 structures were demolished, destroyed, or confiscated, leading to the displacement of over 4,450 individuals. The number of movement obstacles across the West Bank has also increased by 23 per cent since June 2023, with more than 40 per cent of these barriers obstructing direct access to major roads. This has significantly restricted Palestinians' ability to commute to their workplaces and undertake business activities, particularly when traveling between towns and cities, as well as their access to essential services. <sup>8</sup>

These movement barriers, coupled with broader trade restrictions and supply chain disruptions, have severely impacted the West Bank economy. The closure of the Israeli labour market to Palestinian workers has further strained livelihoods. While the private sector has borne the brunt of this crisis, the public sector has not been spared. According to the World Bank, the Palestinian Authority (PA) is projected to face a financing gap that could more than double in 2024 compared to 2023, potentially reaching USD 1.86 billion and jeopardizing the delivery of public services. Notably, the PA's lack of sufficient financial resources has forced it over the years to incur wage arrears to public sector employees, severely undermining their purchasing power and living standards.

As the war enters its second year, economic strains continue to mount, leading to a dramatic escalation in hardship across the OPT. In the Gaza Strip, nearly 100 per cent of the population now lives in poverty, reflecting the dire situation faced by families struggling to meet basic needs. Meanwhile, the significant economic contraction in the West Bank is estimated to have more than doubled the short-term poverty rate, rising from 12 per cent in 2023 to 28 per cent by mid-2024.<sup>10</sup>

## One year on: forecasting economic and labour market trends across the OPT

This section aims to quantify the impact of the war in Gaza on the economy and the labour market in the OPT, building on a combination of labour force survey (LFS) data, GDP estimates from national accounts and projections derived from the PCBS forecasting model, the latter incorporating revised assumptions to reflect recent developments on the ground. Together, these sources provide valuable insights into the economic and labour market performance in the OPT, with a detailed examination of the West Bank and Gaza Strip. The analysis presented herein covers the war year from October 2023 to September 2024 and compares it to the corresponding pre-war period of October 2022 to September 2023.

Leveraging these various data sources, PCBS estimates reveal that the economy in the OPT has been hit hard by the war in Gaza and the escalating violence in the West Bank. Real GDP, measured at 2015 constant USD prices, declined by a staggering 32.2 per cent over the past year, starkly contrasting with the corresponding pre-war period of October 2022 to September 2023 (Figure 2). This contraction is unprecedented in recent history; even

<sup>&</sup>lt;sup>7</sup> PCBS | The Consumer Price Index During , August, 08/2024

<sup>&</sup>lt;sup>8</sup> <u>Humanitarian Situation Update #222 | West Bank | United Nations Office for the Coordination of Humanitarian Affairs - occupied Palestinian territory (ochaopt.org)</u>

<sup>9</sup> World Bank. 2024. Note on the Impacts of the Conflict in the Middle East on the Palestinian Economy - September 2024. Washington, DC.

<sup>10</sup> Ibic

during the most severe economic downturn of the second Intifada in 2001, real GDP fell by only 14.9 per cent less than half the scale of the current decline.

As expected, the economy in Gaza has endured the most severe consequences of the war, with GDP contracting by a staggering 84.7 per cent over the past year compared to the corresponding pre-war period. In contrast, real GDP in the West Bank declined by 21.7 percent during the same timeframe. Although this contraction may appear less severe in comparison to Gaza's, it is significant to note that the West Bank economy lost more than USD 2.89 billion in total value in the past year, surpassing the pre-war GDP of the Gaza Strip, which stood at USD 2.66 billion.

406 Gaza Strip 2,660 West Bank 13,302 OPT 15.962 October 2023 - September 2024 October 2022 - September 2023

▶ Figure 2: Real GDP in the OPT, West Bank and the Gaza Strip (constant 2015 USD prices, million)

Source: PCBS estimates based on national accounts.

An examination of sectors, as presented in Table 1, highlights the economic impact across different industries. While the overall contribution of each sector to GDP has not shifted significantly during the year of war, all sectors saw a notable decline in value added, with "Construction" and "Manufacturing, mining, electricity and water" being particularly affected. The steep drop in these sectors can be attributed to their heavy reliance on stability and resource availability. Construction, for example, depends on large capital investments and the movement of materials and labour, both of which are severely disrupted by conflict and war-related uncertainties. Manufacturing faces similar challenges, as it relies heavily on supply chains, access to raw materials and the ability to transport goods, all of which have been constrained in both the West Bank and Gaza Strip. Additionally, damage to facilities and energy infrastructure has further eroded the productive capacity in these sectors. In contrast, sectors such as telecommunications and financial services have been less affected due to their greater resilience to physical disruptions, compared to others, and their essential role during times of crisis and war.

A closer examination of PCBS data from the Gaza Strip reveals that value added across all industries has been severely devastated, with most economic activities halted. The "Human Health and Social Activities", "Public Administration and Defense", and "Education" sectors together accounted for nearly 84 per cent of GDP. Meanwhile, contributions from other sectors and sub-sectors have become largely insignificant. 11

▶ Table 1: Distribution of real GDP by sector in the OPT, (October 2023 - September 2024) compared to the corresponding period pre-war

	October 2022 - September 2023		October 2023 - September 2024		
	Million USD	% distribution	Million USD	% distribution	% change
Agriculture, forestry and fishing	927	5.8	647	6.0	-30.2
Manufacturing, mining, electricity and water supply	1,904	11.9	1,231	11.4	-35.4
Construction	686	4.3	361	3.3	-47.3
Wholesale and retail trade	2,891	18.1	2,054	19.0	-29.0
Transportation and storage	244	1.5	163	1.5	-33.5
Financial and insurance activities	781	4.9	605	5.6	-22.5
Information and communication	503	3.2	410	3.8	-18.5

<sup>&</sup>lt;sup>11</sup> PCBS national accounts data and estimates.

#### **▶ ILO Brief**

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Households' activities, custom duties and VAT on imports, net	2,989	18.7	1,947	18.0	-34.9
Public administration and defense	1,826	11.4	1,193	11.0	-34.7
Services	3,210	20.1	2,205	20.4	-31.3

Source: PCBS estimates based on national accounts.

The depth and speed of declines in real GDP not only reflect the direct effects of the war on infrastructure and economic activity but also its far-reaching implications on household incomes and overall living standards. During the past year, real GDP per capita dropped sharply by 33.4 per cent across the OPT compared to the same period pre-war. This steep decline reflects the war's crushing impact on individual wealth and purchasing power, leading to an even deeper erosion of Palestinians' living standards. The Gaza Strip suffered the most catastrophic decline, with real GDP per capita plunging by 84.9 per cent, underscoring the war's significant impact on an already vulnerable population. In the West Bank, while less severe, real GDP per capita fell by 23.4 per cent, highlighting the widespread nature of the economic hardship across both territories.

In relative terms, real per capita GDP in the Gaza Strip constituted a mere 5.2 per cent of that in the West Bank over the past year, a stark decline from 26.6 per cent in the preceding corresponding period.

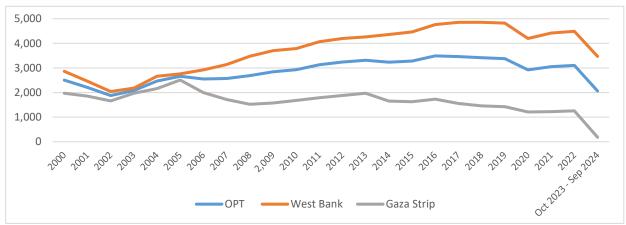
4,525 3,467 3,099 2.063 1,203 181 OPT West Bank Gaza Strip October 2023 - September 2024 October 2022 - September 2023

▶ Figure 3: Real GDP per capita in the OPT, West Bank and Gaza Strip (constant 2015 USD prices)

Source: PCBS estimates based on national accounts.

The current collapse in per capita GDP is unprecedented, even when considered within the context of the OPT's decades-long economic instability. The scale of the decline resulting from the war far surpasses any previous economic downturn, as illustrated in Figure 4. This significant collapse carries serious implications for individuals and their families. As living standards deteriorate, access to essential goods and services like food, healthcare and education becomes increasingly challenging, if not impossible. With the war ongoing, concerns about its longterm effects increase, potentially hindering recovery efforts and limiting future opportunities for growth and stability.





Source: PCBS estimates based on forecasting model and national accounts.

The situation in the labour market is equally bleak. According to PCBS estimates, the labour force participation rate in the OPT was 43.5 per cent during the war year, down from 45.2 per cent in the previous corresponding period. This downward trend is evident in both the West Bank and the Gaza Strip, where labour force participation rates fell by 1.8 and 1.5 percentage points, respectively (Figure 5). These declines are not entirely unexpected, given the challenging economic conditions and the feeling of discouragement that can drive segments of the working-age population out of the labour force during times of war.<sup>12</sup>

In tandem with the declining labour force participation rates, the unemployment rate in the OPT is projected to have surged dramatically over the past year, reaching an alarming 51.1 per cent, according to PCBS estimates. Specifically, the unemployment rate is estimated at 34.9 per cent in the West Bank, while the Gaza Strip faces a rate of 79.7 per cent. These figures represent a substantial increase compared to the previous corresponding period, underscoring the dire economic and labour market situation in both the West Bank and the Gaza Strip.

The deteriorating employment conditions and prospects are a direct result of the extensive destruction of the economy in the Gaza Strip and the war's repercussions in the West Bank. The closure of the Israeli labour market to Palestinian workers has further contributed to the worsening labour market outcomes. Notably, before the onset of the war, there were some 190,000 Palestinian workers employed in Israel and the settlements. However, by the third quarter of 2024, estimates from the PCBS indicate that only around 26,000 Palestinian workers remain employed in the Israeli economy, predominantly in the West Bank settlements.

# ► Figure 5: Unemployment and labour force participation rates in the OPT, West Bank and Gaza Strip (October 2023 - September 2024), compared to the corresponding period pre-war (%)



Source: PCBS estimates based on forecasting model and available labour force surveys Q3 2022 - Q2 2024.

Overall, PCBS estimates reveal a substantial increase in total unemployment in the OPT, averaging 734,685 during the past year of war. This figure marks an increase of 363,213 compared to the previous corresponding period (October 2022 to the end of September 2023) and represents the highest rise in unemployment since the signing of the Oslo Accords in 1993.

While this surge is significant, unemployment figures alone do not account for all forms of labour underutilization, such as time-related underemployment, which is expected to be particularly pronounced among workers in the Gaza Strip. Additionally, unemployment statistics overlook individuals in the potential labour force, including those discouraged workers who have exited the labour force entirely, but would welcome employment opportunities if these become available. Others who have lost employment in Israel and are hesitant to seek

<sup>&</sup>lt;sup>12</sup> While economic hardships during times of war can sometimes drive higher labour force participation rates, unsuccessful job searches and the lack of jobs can also lead to discouragement, causing individuals to exit the labour force.

employment in the West Bank while awaiting a return to the Israeli labour market are also not accounted for in the unemployment figures.

The prolonged war has not only disrupted jobs and employment but also severely deteriorated working conditions of those who remain employed. While up-to-date data from the Gaza Strip are lacking, anecdotal evidence points to a growing dependence on informal work, such as street vending and other small, irregular activities, as families struggle to survive amidst limited humanitarian and financial aid. Alarmingly, the involvement of children in informal precarious activities has become an urgent concern. It is also worth noting that, even before the war, informal employment accounted for 63.4 per cent of total employment in the Gaza Strip. Today, decent work gaps have worsened, including low wages, lack of access to social protection, irregular hours, poor occupational safety and health conditions, and limited worker representation.

## The gendered impact of war – insights from the West Bank

The war's impact on the labour market has not been gender-neutral, with men and women facing severe, yet different economic and employment challenges. Due to the lack of data from Gaza, this section focuses solely on the West Bank, drawing on actual labour force survey data from October 2022 to June 2024.

As shown in Table 2, labour force participation rates fell during the first nine months of the war compared to the corresponding period pre-war, with men experiencing a slightly larger decline (-2.2 percentage points) than women (-1.4 percentage points). Unemployment rates, however, saw a dramatic surge, with men's rates more than tripling, increasing by 25 percentage points, while women's unemployment rate rose by 6.1 percentage points. As these statistics indicate, most individuals who lost their jobs have continued to actively seek employment, with relatively few opting to leave the labour force altogether.

► Table 2: Labour force participation and unemployment rates in the West Bank, by sex, Q3 2022 - Q2 2024 (%)

	October 2022 - June 2023	October 2023 – June 2024	Change in percentage points
Labour force participation rate			
Male	76.4	74.3	-2.2
Female	19.3	17.9	-1.4
Unemployment rate			
Male	11.5	36.5	25.0
Female	24.6	30.7	6.1

Source: PCBS labour force surveys, Q4 2022 - Q2 2024.

Further examination of the composition of the working-age population across gender lines, as depicted in Figure 6, reveals that men experienced the most severe impact during the first nine months of the war, with employment levels plummeting by 28.3 per cent. This decline is primarily attributed to substantial job losses in Israel, where a significant number of Palestinians from the West Bank were formerly employed. As these workers sought opportunities in the West Bank, the economy's limited capacity to generate new jobs amid challenging conditions resulted in a more than threefold increase in unemployment. This economic strain has also contributed to a 12.3

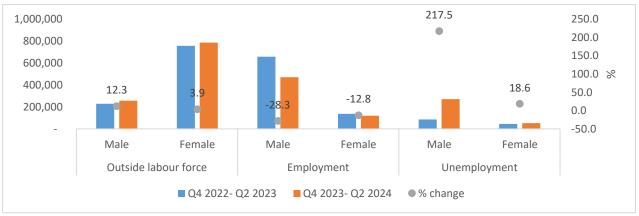
<sup>&</sup>lt;sup>13</sup> The situation of workers of the occupied Arab territories – Report of the Director-General – Appendix, Geneva: International Labour Office, 2024

per cent rise in inactivity, as an increasing number of men in the working age population have opted to exit the labour force altogether in response to the prevailing hardships.

For women, the effects have also been severe, albeit less pronounced compared to men. Employment levels have decreased by 12.8 per cent, while unemployment has risen by 18.6 per cent and inactivity has increased by a mere 3.9 per cent. These results are not surprising, given that many women, compared to men, were already in more stable positions within the workforce before the war, primarily engaged in the public sector or other industries such as education and healthcare, which have been less adversely affected by the war compared to industries like construction and manufacturing, where men constitute a larger proportion of the workforce. Furthermore, prior to the war, few women were employed in the Israeli labour market so the closure of this market to Palestinians has not significantly impacted employment levels among women.

That said, and while the war has led to a comparatively lower level of disruption in employment outcomes among women than that experienced by men, it is essential to recognize that women's labour market indicators were already dismal before the war. The prevailing economic and labour market crisis has only deepened their vulnerability, with potential longer-term repercussions. Unlike men, women who lose their jobs face considerable challenges when trying to reintegrate into the labour market. Equally concerning is the potential rise in exploitation, violence and harassment against women, which tends to intensify in times of war and economic hardship.<sup>14</sup>

# ► Figure 6: Change in employment, unemployment and population outside the labour force in the West Bank, by sex, Q4 2023 - Q2 2024, compared to Q4 2022 - Q2 2023



Source: PCBS labour force surveys, Q4 2022 - Q2 2024.

Alongside job losses and reduced employment opportunities, real daily wages in the West Bank have declined in the months following the outbreak of the war. As illustrated in Figure 7, men experienced a more significant decline than women, which is expected given the substantial job losses in Israel, where average daily wages have historically been nearly double those in the local economy of the West Bank, and because male-dominated sectors like construction and manufacturing have been more severely affected. Although women faced a milder decline, they continue to earn significantly less than men, with women earning 19.1 per cent less than their male counterparts as of Q2 2024.

#### ▶ Figure 7: Real daily wages in the West Bank, by sex, Q4 2022- Q2 2024, in NIS 180.0 160.0 140.0 120.0 100.0 80.0 Q4 2023 Q1 2024 Q4 2022 Q1 2023 Q2 2023 Q3 2023 Q2 2024 Men Women Total

Source: PCBS, labour force surveys, Q4 2022 - Q2 2024.

## ► Concluding remarks

As the war enters its second year, the lives and futures of countless Palestinians have been dramatically shattered, with entire communities enduring severe hardship. This ongoing war has decimated livelihoods, leaving hundreds of thousands of workers without income and driving families further into poverty, unable to meet their most basic needs. Today, more people are facing the grim realities of hunger, displacement, deepening poverty and death. While immediate, albeit limited, humanitarian aid is being provided, broader and effective recovery efforts necessitate an urgent and complete cessation of war in the OPT. Without an end to the violence, there can be no foundation for addressing the escalating economic and labour market crisis, restoring essential services, or initiating long-term recovery, in line with the Humanitarian, Development and Peace Nexus.

Once peace is restored, a "building forward better" approach becomes essential. Such an approach not only repairs damage but also fosters resilience and promotes long-term sustainable and inclusive development. Employment-intensive infrastructure programs will be critical for generating immediate jobs while addressing significant gaps in the OPT's physical infrastructure. Strong safeguards are needed during reconstruction to ensure occupational safety and health and prevent labour exploitation.

Strengthening social protection systems will also be vital, particularly by linking short-term humanitarian interventions to long-term sustainable and rights-based frameworks that contribute to a stronger national social protection floor. Further supporting the Humanitarian-Development-Peace Nexus approach in social protection is pivotal to delivering resilient social assistance programmes to the many facing poverty and vulnerability, while also sustaining recent advancements in the sector, namely the introduction of social allowances for persons with severe disabilities and older persons, and relaunching efforts towards the establishment of a social insurance system for all Palestinians.

Investing in education and skills development is equally essential. This investment not only helps equipping workers with the skills needed for a post-war labour market recovery but is also crucial for the reintegration of children into education after more than a year of school closures. Prioritizing this reintegration is vital to preventing long-term and potentially irreversible damage to children's future employment prospects.

In parallel, supporting micro, small, and medium-sized enterprises is key, as it not only aids employers and entrepreneurs but also plays a crucial role in driving job creation and ensuring economic stability.

Above all, the recovery process must be inclusive, with social dialogue at its core. Engaging workers' and employers' representatives with the government to shape recovery efforts will help ensure that solutions are both equitable and sustainable. It is also imperative that the specific needs of both women and men, as well as youth, adults and people with disabilities are recognized and addressed to foster a more resilient and inclusive society.

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Contact details International Labour Organization Regional Office for the Arab States Aresco Centre - Justinien Street - Kantari Beirut - Lebanon	T: +961-1-752400 E: beirut@ilo.org	DOI: https://doi.org/10.54394/LOPQ2286
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