

YOUTH – EMPLOYER PERSPECTIVE ON THE LABOUR MARKET CHALLENGES

SSA & MENA – 2021 Survey Results

CONTENTS

- 01** Introduction
- 02** Executive summary
- 03** Key insights deep dive
- 04** Work readiness program assessment



INTRODUCTION

OLIVER WYMAN COLLABORATED WITH INJAZ AL-ARAB AND JA AFRICA TO SURVEY YOUTH AND EMPLOYERS ON THE PERCEIVED SKILLS GAP IN THE LABOUR MARKET

Purpose

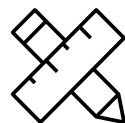
The rise of youth unemployment in Sub-Saharan Africa and the Middle East & North Africa cannot entirely be attributed to a lack of opportunities in the formal labour market. Part of the problem can potentially be explained by a **widening gap** between the **supply of skills** provided by youth and the **demand for skills** from employers.

The survey aims to deep dive into both youth and employers' perspectives of the labour market challenges to

- Deepen our insights on the challenges in the job market for both youth and employers, and
- Use these insights to influence the private sector and public policy in addressing these challenges

Approach

Over the month of May 2021, Oliver Wyman, in collaboration with JA Africa and INJAZ Al-Arab, successfully surveyed youth and employers in the following a four-step approach:



Design survey

Design **survey** | questionnaires based on skills gap problem statement



Deploy

Share **survey** | links through distribution channels (Social media, JA Africa/INJAZ Al-Arab network, email, WhatsApp)



Analyse

Analyse **survey** | results and extract key findings and insights



Validate

Hold focus group discussions with representatives of employers in the public and private sector

THE TWO SURVEYS CONDUCTED REPRESENT YOUTH AND EMPLOYERS' VIEWS ACROSS 13 MEMBER NATIONS

The youth-survey comprised of 20 questions covering five main topics

1. Perception of opportunities in the labour markets (public & private sector)
2. Perception of challenges in the labour market (public & private sector)
3. Skills gap diagnosis
4. Preparation for the workforce including access to education & training
5. Impact of COVID-19 on the labour market and prospects

The employer-survey comprised of 25 questions covering four main topics

1. Perception of skills gaps
2. Perception of challenges faced by young people
3. Employer-led initiatives to close skills gaps
4. Requirements for the future workforce considering the impact of COVID-19

Distributed to 13 countries across two regions

Middle East & North Africa



Egypt



Saudi Arabia



Kuwait



Lebanon



Morocco



Qatar



UAE

Sub-Saharan Africa



Eswatini



Gabon



Nigeria



South Africa



Uganda

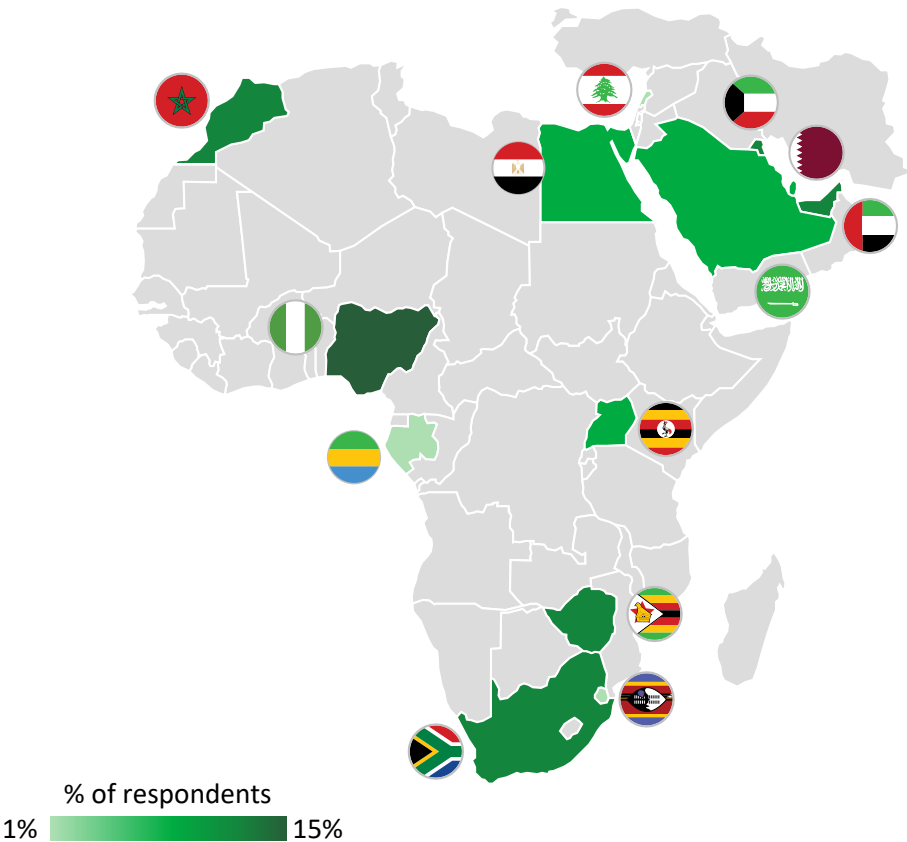


Zimbabwe

MORE THAN 350 EMPLOYERS ACROSS SUB-SAHARAN AFRICA, NORTH AFRICA AND THE MIDDLE EAST PARTICIPATED IN THE EMPLOYER-PERSPECTIVE SURVEY

352

Employer respondents



Representation of employers

Industry (top 5)



27%
Education



18%
Other (public
sector, NPO)



11%
Financial services

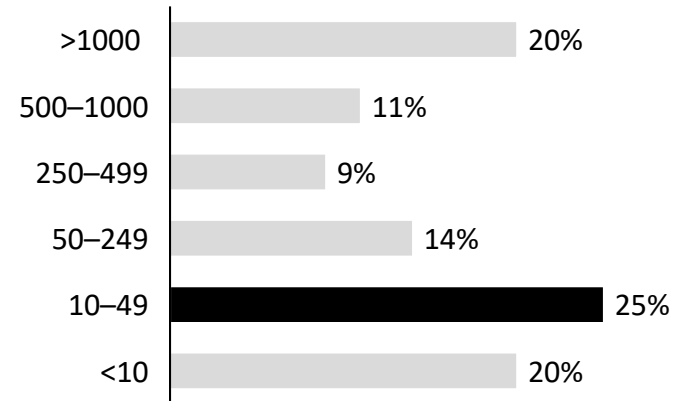


6%
Manufacture,
engineering

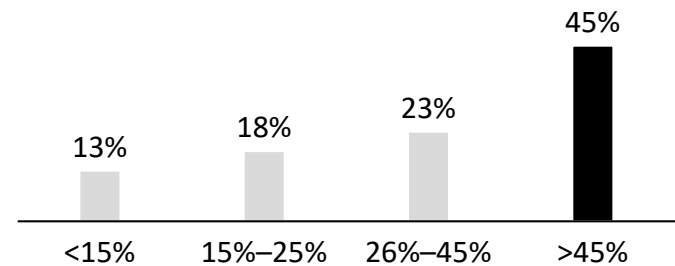


6%
Professional
services

Organisational size (number of employees)



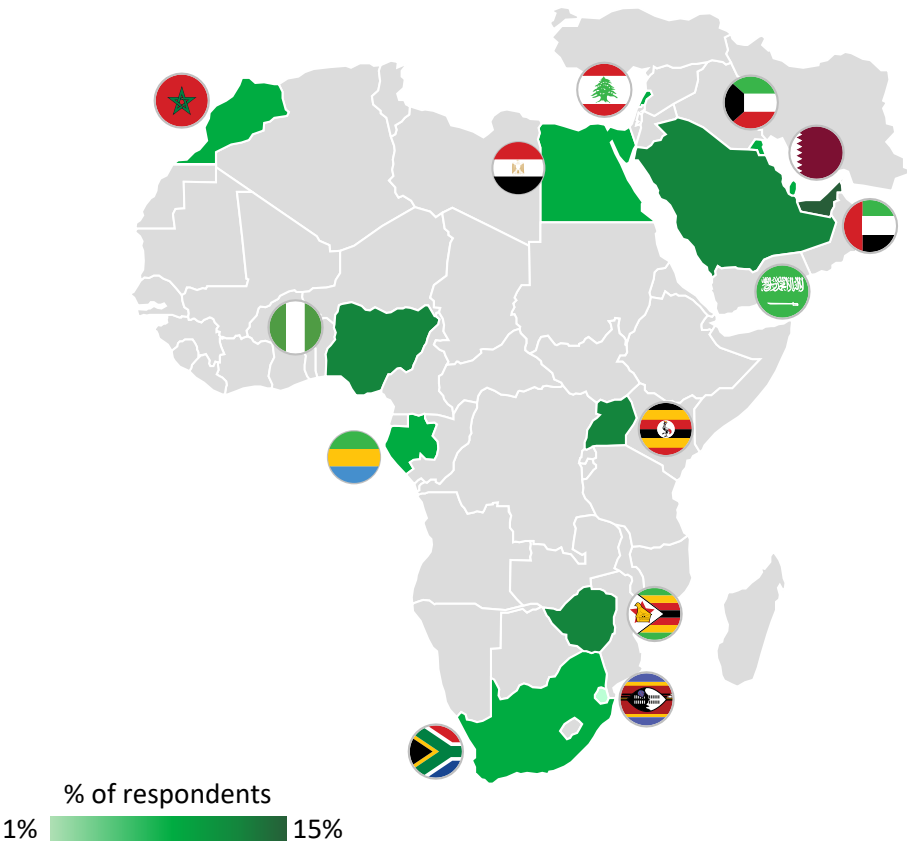
% of youth employed (% youths in firm)



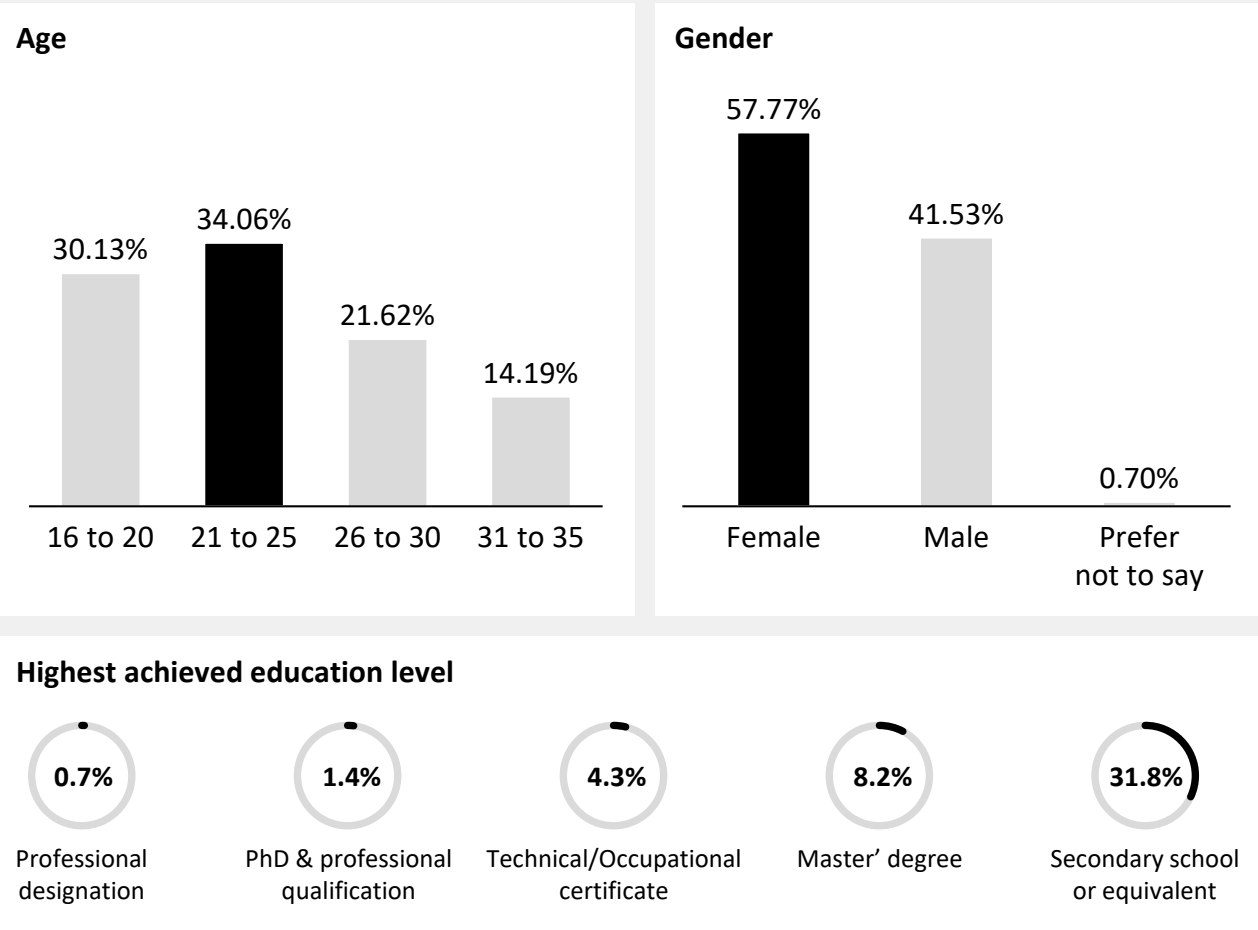
MORE THAN 2000 YOUTH ACROSS SSA AND MENA ALSO PARTICIPATED IN THE SURVEY

2290

Youth respondents



Representation of youth



IN ADDITION TO THE SURVEYS

We conducted five focus groups to hear stakeholders' perspectives on the labour market and work-readiness programs

18

Employers

9

Industries

3

Focus groups

13

Member nations

13

Program facilitators

2

Focus groups



Military defence



Trade union



Professional services



Oil & gas



Educational institution



Wholesale & retail consumer services



Freight



Financial services



Youth development agencies



Program facilitators from Junior Achievement Africa and INJAZ Al-Arab provided feedback on the successes and shortfalls of work-readiness programs in their markets

OLIVER WYMAN IS A GLOBAL MANAGEMENT CONSULTING FIRM WITH OVER 20 YEARS OF EXPERIENCE IN THE MIDDLE EAST AND AFRICA



Oliver Wyman Group is part of Marsh & McLennan Companies, the NYSE traded \$17 BN + global professional services firm

Oliver Wyman is a management consulting firm providing specialist advice across a broad set of topics to our clients

We have offices across IMEA in Johannesburg, Doha, Dubai, Abu Dhabi, Riyadh and Mumbai working with the largest institutions across the region



1984
Founded



100+
CSR initiatives



5,000
Colleagues



US\$2 BN
Revenue (2020)



29
Countries



60+
Offices

Industry knowledge

More than 35 years of experience in consulting with leading companies

- Automotive
- Aviation, Aerospace & Defense
- Business Services
- Communication, Media & Technology
- Distribution & Wholesale
- Educational
- Energy
- Financial Services
- Health and Life Sciences
- Industrial Products
- Public Sector
- Retail & Consumer Products
- Surface Transportation
- Travel & Leisure

Capabilities

Broad expertise in functional areas, with over 500 partners worldwide

- Sustainability Center
- Actuarial
- Corporate Finance & Restructuring
- Digital
- Operations
- Oliver Wyman Labs
- Organizational Effectiveness
- Pricing, Sales and Marketing
- Risk Management
- Service Operations
- Strategic Information
- Technology
- Strategy

+ **Lippincott** Brand strategy and design

+ **NERA** Economic Consulting Economic advice on competition, regulation and litigation

INJAZ AL-ARAB PROVIDES VARIOUS TRAINING PROGRAMS TO MENA’S YOUTH TO PROMOTE EMPLOYABILITY AND JOB CREATION



INJAZ Al-Arab continues to **inspire and prepare a generation of Arab youth** to utilize their natural talent, inspiration, and passions to become the leaders of tomorrow

By offering relevant training, mentorship and networking programs, INJAZ Al-Arab strives to accelerate Arab youth’s ability to contribute to the economic development of their nations and regions as **entrepreneurs and business leaders of their communities**

INJAZ Al-Arab’s pillars of education comprise of **workforce readiness, financial literacy and entrepreneurship**

With a network of 13 ministries of education, over **4,000 schools**, **346 universities** and **80,000+ corporate volunteers**, INJAZ Al-Arab aims to equip the youth with the skills demanded by the private sector to foster employability and job creation

Since 2004, more than **4 million students** have completed INJAZ Al-Arab programs across the MENA region



JUNIOR ACHIEVEMENT AFRICA PROVIDES SSA YOUTH WITH TRAINING PROGRAMS TO BRIDGE THE GAP BETWEEN CLASSROOM EDUCATION AND THE WORLD OF WORK

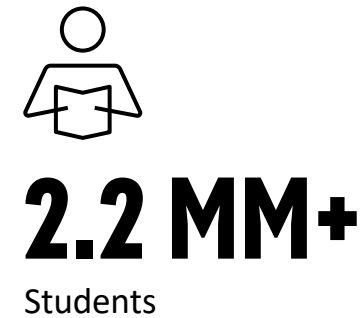
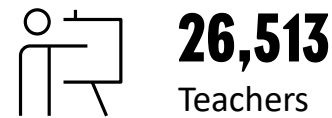


Junior Achievement Africa (JA Africa) is a non-profit organisation which **builds skills and access to employment** for youth across Africa

JA Africa’s mission is to **prepare youth for the future workforce, foster social mobility and financial inclusion** among African youth **through financial literacy, improved employability and microenterprise creation**

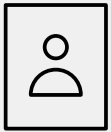
Since its first country and program launch in sub-Saharan Africa in 1979, JA now has a presence in **14 countries**, with expansion underway in other countries. **In the last decade alone**, JA has reached and impacted over **2.2 million** African youth

JA Africa’s pillars are **workforce readiness, financial literacy and entrepreneurship skills training**



EXECUTIVE SUMMARY

YOUTH HAVE A POSITIVE OUTLOOK ON THE PRIVATE AND PUBLIC SECTORS, HOWEVER THERE ARE IMPORTANT CHALLENGES TO OVERCOME



Employers have clearly pointed to digital and behavioural skills as a significant gap for youth



Youth on the other hand have called out work experience as their key challenge to find employment



01. SECTORAL OPPORTUNITIES & CHALLENGES

36%

Of **MENA youth** aim to occupy spaces in **government agencies and public sector**

33%

Of **SSA youth** aspire to be entrepreneurs and self-employed in the short term

48%

Of **all youth** are attracted to the technology industry

60%

Of **youth** (71% in Africa; 51% in MENA) will need to overcome their lack of relevant work experience if they are to secure employment in either the public or private sector

EMPLOYERS

Opine that lack of required skillset prevents youth from working in the private sector

02. QUALIFYING THE SKILLS GAP

Digital and behavioural skills gaps are the widest in the SSA labour market as observed by employers

41%

Of SSA youth find it difficult to acquire digital skills ranging from basic computer skills and IT literacy to advanced technological, data and coding skills

Behavioural and analytical skills gaps are the widest in the MENA labour market as observed by employers

43%

Of MENA youth believe it is easy to acquire behavioural skills as it pertains to issues of professionalism, attitude, resilience and professional EQ

Majority of employers and youth believe that **technology has the potential to create jobs** across regional markets. However, due to the digital skills gap in the market, **organisations shy away from adopting new technologies**

03. BRIDGING THE GAP



~70%

Of youth strongly believe that they require upskilling and updated education in order to become and remain relevant in the market



50%

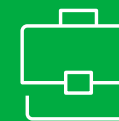
Of employers believe that internships and learnerships provide the best preparation for the workplace

04. IMPACT OF COVID-19 ON LABOUR MARKETS



62%

Of employers have experienced increased difficulty in creating jobs since the COVID-19 pandemic



50%

Of youth have experienced increased difficulty in finding employment since the outbreak of COVID-19

KEY INSIGHTS DEEP DIVE

01

SECTORAL OPPORTUNITIES & CHALLENGES

High level youth perspectives about the public and private sectors

Perceived opportunities and challenges across industries

Barriers to entry in the public and private sectors

02

QUALIFYING THE SKILLS GAP

Skills gap diagnostic from the point of view of youth and employers

Technology: opportunities & challenges facing its adoption in the workplace

03

BRIDGING THE GAP

Qualifying the need for upskilling

Perceived efficiency of work readiness enablers

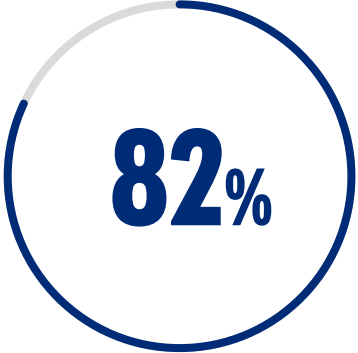
04

IMPACT OF COVID-19 ON LABOUR MARKETS

Economic impact of COVID-19 on job seeking and job creating

Job market impact of COVID-19

YOUTH ARE MORE ATTRACTED TO THE PRIVATE SECTOR THAN THE PUBLIC SECTOR



82%

Of youth agree that they have a positive opinion about the **private** sector's contribution to their country's economy



70%

Of youth agree that they have a positive opinion about the **public** sector's contribution to their country's economy



AS SUCH, YOUTH SEE THEMSELVES WORKING FOR LARGE COMPANIES IN THE PRIVATE SECTOR



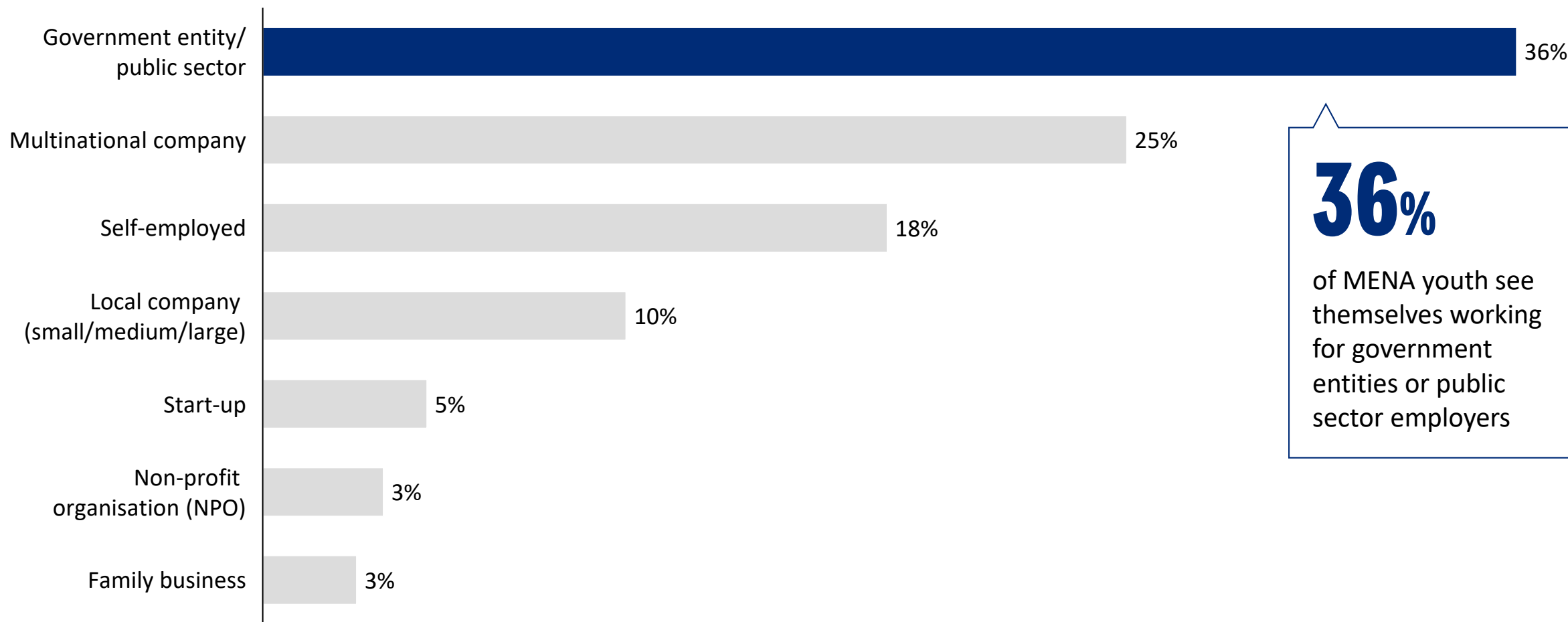
25%

Of youth see themselves working for multinational companies in the near future



MENA YOUTH ARE INCLINED TOWARDS JOB PROSPECTS IN GOVERNMENT ENTITIES AND THE PUBLIC SECTOR

Which type of employer do you see yourself working for in the near future?



YOUTH IN SSA ASPIRE TO PURSUE ENTREPRENEURIAL OPPORTUNITIES



1 IN 3

SSA youth see self-employment as their primary job option in the near future

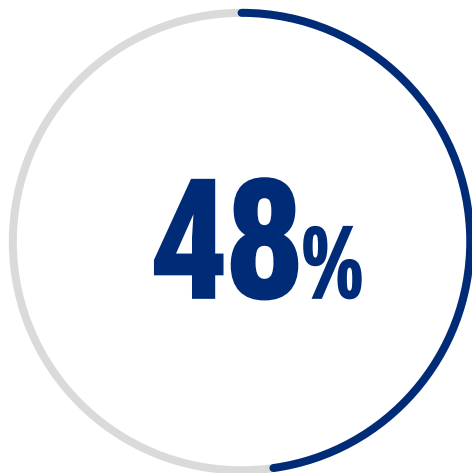


32%

Increase from 2020



THE TECHNOLOGY INDUSTRY IS THE MOST ATTRACTIVE TO YOUNG PEOPLE

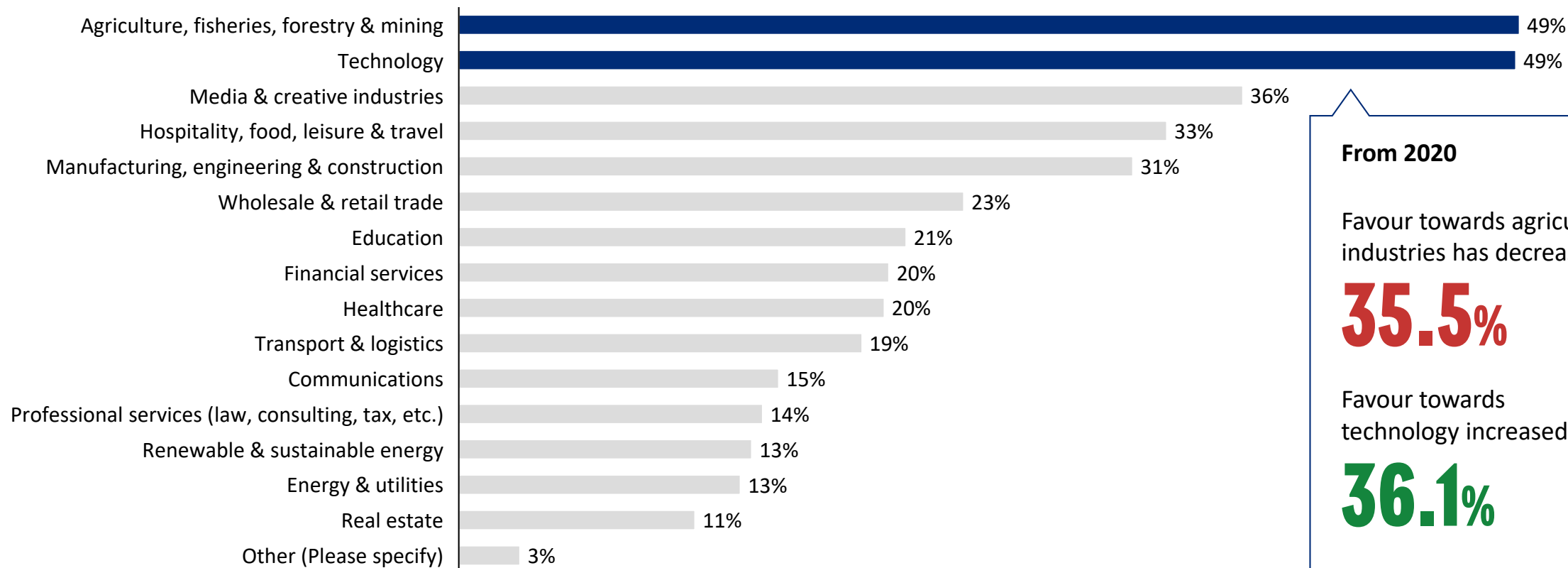


Of youth (49% in SSA; 43% in MENA) believe that the technology industry presents the most opportunities for youth employment and job creation in their country



SSA YOUTH BELIEVE THAT AGRICULTURE, FORESTRY AND MINING IS AS ATTRACTIVE FOR ENTRY AS THE TECHNOLOGY INDUSTRY

In your opinion, which industries do you believe are attractive for young people, and present the most opportunities for youth employment and job creation in your country?



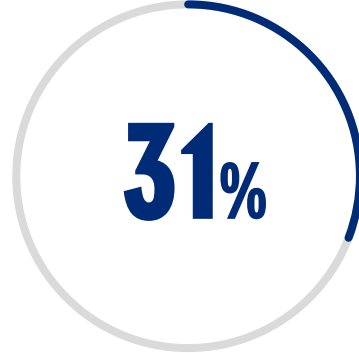
Responses do not add up to 100%; respondents could select more than one answer

FINANCIAL SERVICES AND EDUCATION ARE THE LEAST ATTRACTIVE INDUSTRIES FOR YOUTH DUE TO PERCEIVED BARRIERS TO ENTRY

A donut chart with a blue segment representing 34% of the total. The rest of the chart is light gray.

34%

Of SSA youth believe that the **financial services** industry is the most difficult industry to enter

A donut chart with a blue segment representing 31% of the total. The rest of the chart is light gray.

31%

Of MENA youth believe that the **education** industry has the biggest barriers to entry



Perceived opportunities and challenges across industries

MENA YOUTH ARE ATTRACTED TO THE HOSPITALITY INDUSTRY

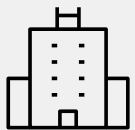
But also identified the industry as one with the second highest perceived barriers to entry

38%

Of MENA youth are attracted to the hospitality, food, leisure and travel industry

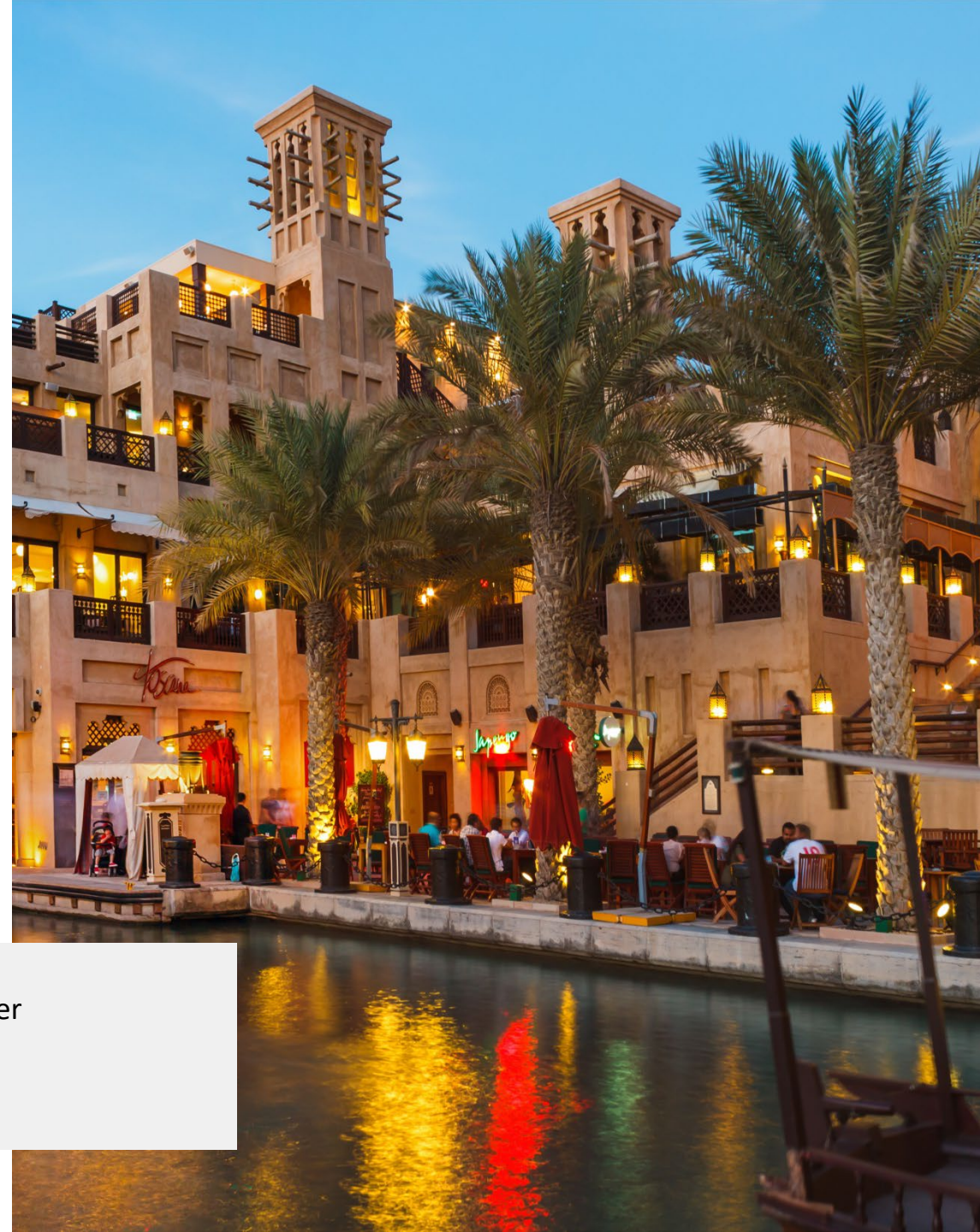
30%

Of MENA youth believe that the hospitality industry has the biggest barriers to entry

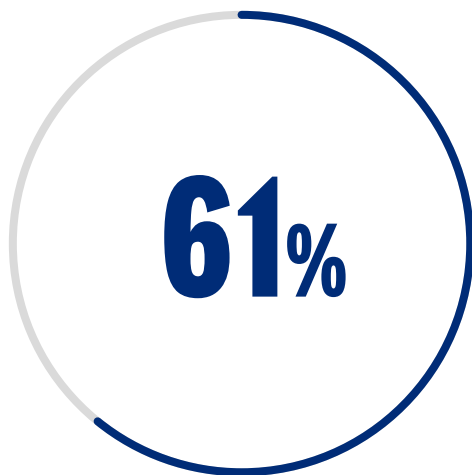


Hospitality is perceived to be the 2nd most difficult industry to enter

Hospitality is the 2nd most attractive industry to MENA youth



EMPLOYERS AND YOUTH HAVE MISALIGNED VIEWS OF WHAT FACTORS DISCOURAGE YOUTH FROM WORKING IN PUBLIC SECTOR



Of youth (63% in SSA; 62% in MENA) are discouraged from working in the public sector due to the lack of job opportunities and vacancies

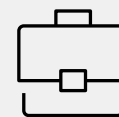
Top three factors which employers believe discourage youth from working in the public sector

Preferential treatment to personal connections



51%

Shortage of job opportunities (lack of vacancies)



42%

Lack of information on available opportunities



35%

Barriers to entry in the public and private sectors

EMPLOYERS OPINE THAT LACK OF REQUIRED SKILLSET PREVENTS YOUTH FROM WORKING IN THE PRIVATE SECTOR

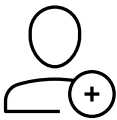
Top three factors which discourage youth from working in the private sector

Lack of the skillset required by the job



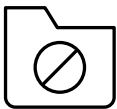
49%

Lack of years of experience required for the job

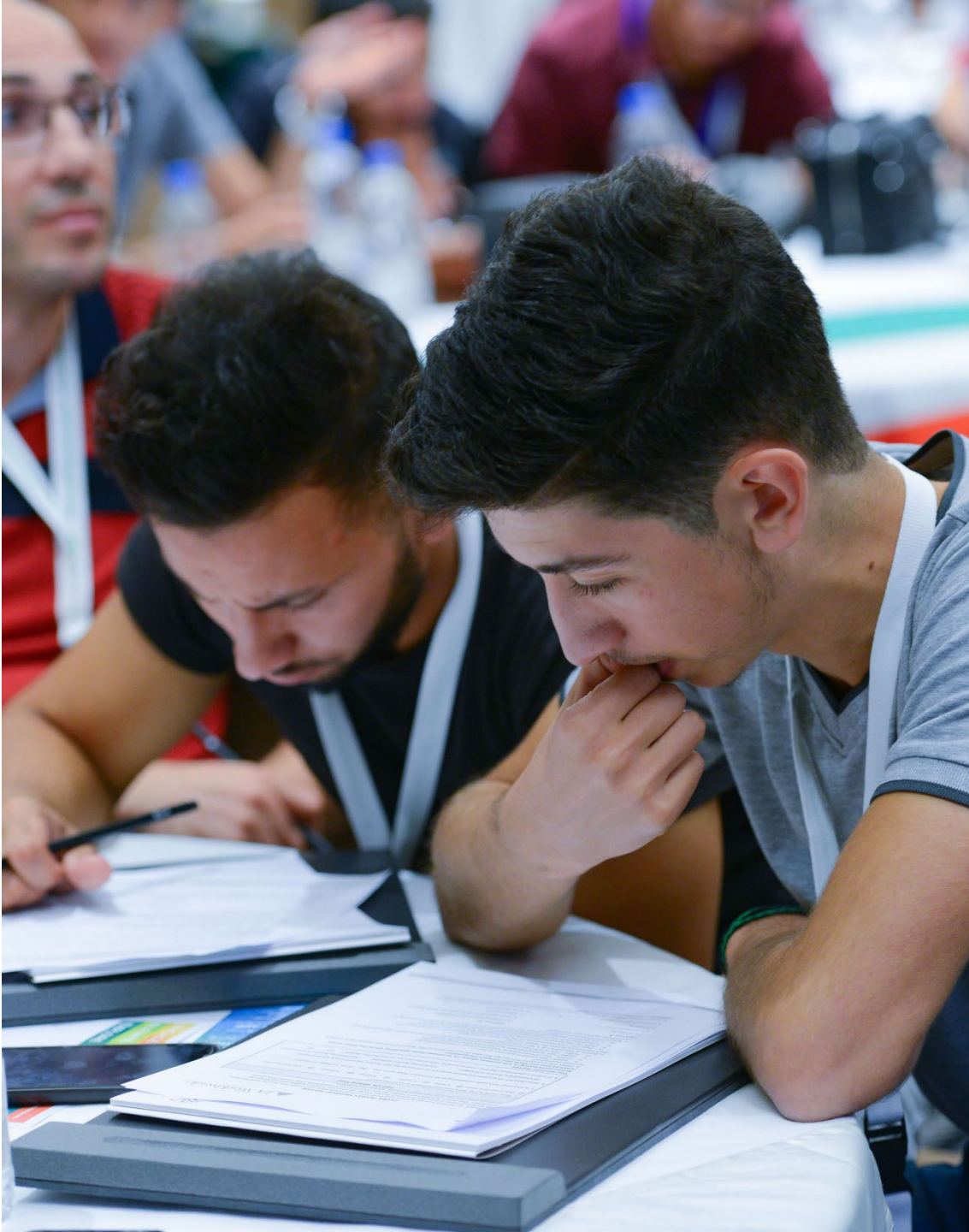


49%

Shortage of job opportunities (no vacancies)

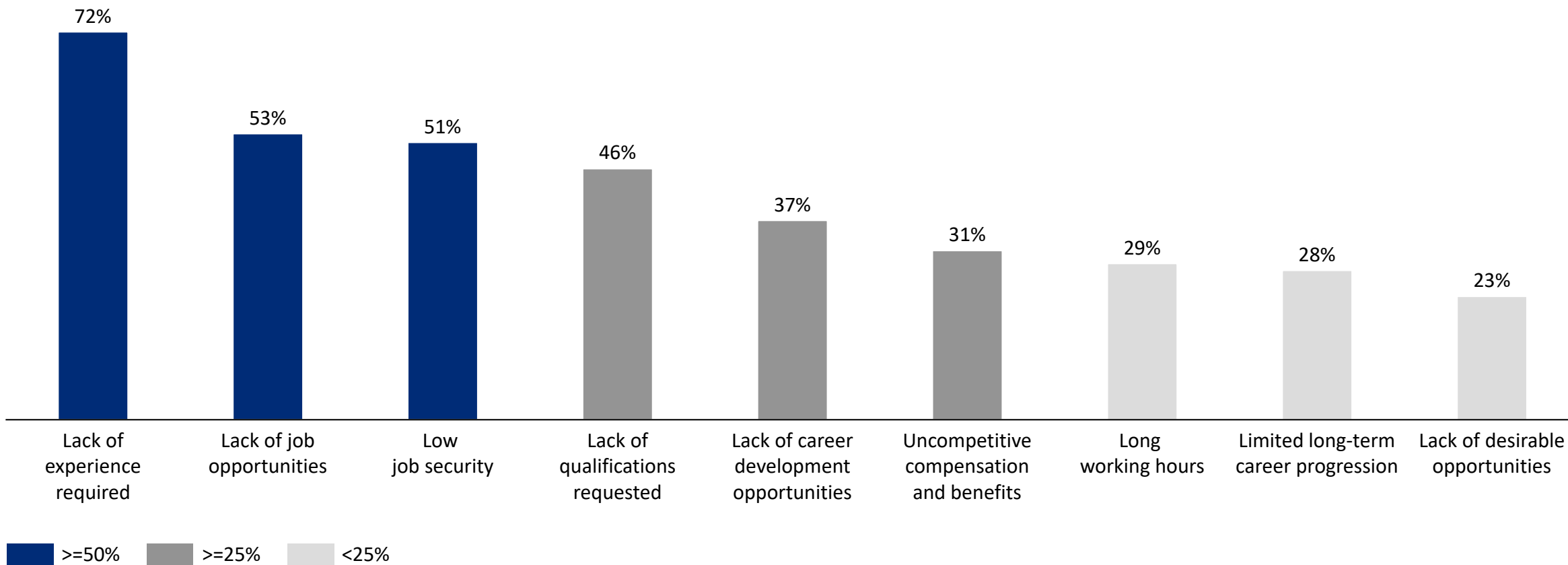


41%



MAJORITY OF SSA YOUTH ARE DISCOURAGED FROM WORKING IN THE PRIVATE SECTOR DUE TO LACK OF RELEVANT WORK EXPERIENCE

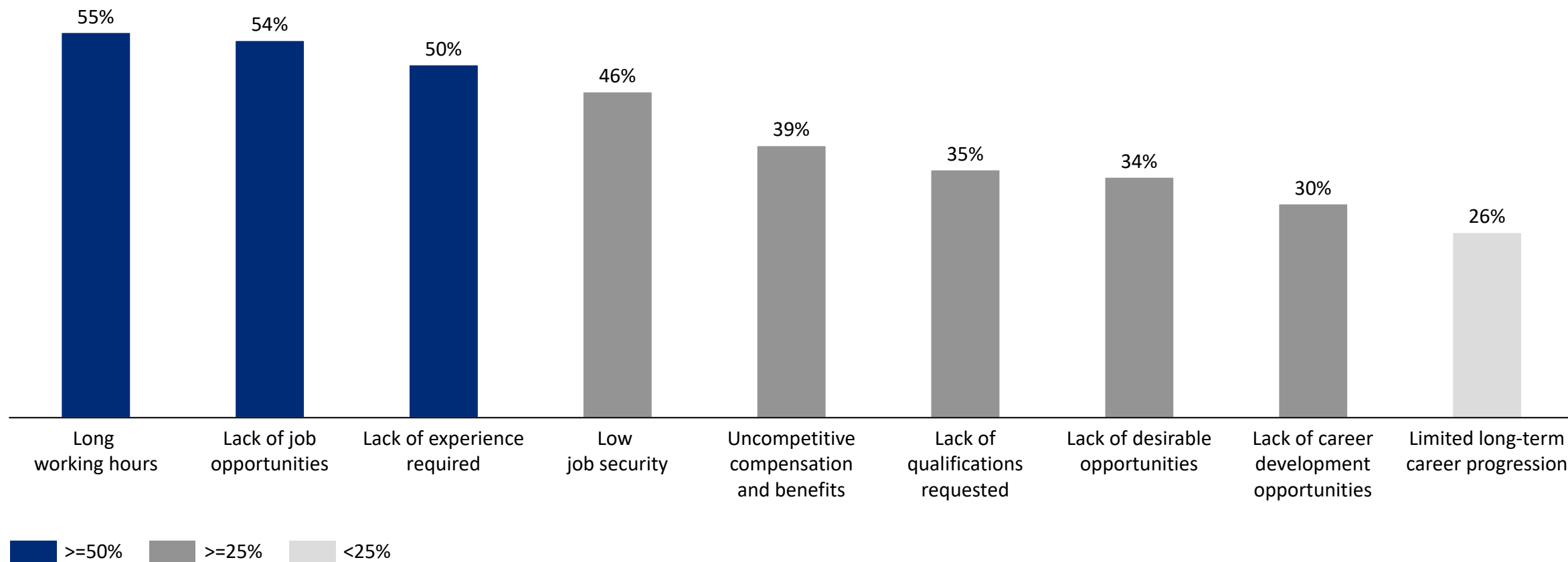
In your opinion, what are the factors that may discourage youth from working in the private sector?



Responses do not add up to 100%; respondents could select more than one answer

MENA YOUTH ARE DISCOURAGED FROM WORKING IN THE PRIVATE SECTOR DUE TO LONG WORKING HOURS, LACK OF OPPORTUNITIES AND INEXPERIENCE

In your opinion, what are the factors that may discourage youth from working in the private sector?



Responses do not add up to 100%; respondents could select more than one answer

PROFESSIONAL INEXPERIENCE IS THE PRIMARY ADVERSITY CHALLENGING YOUTH IN THEIR QUEST TO SECURE EMPLOYMENT

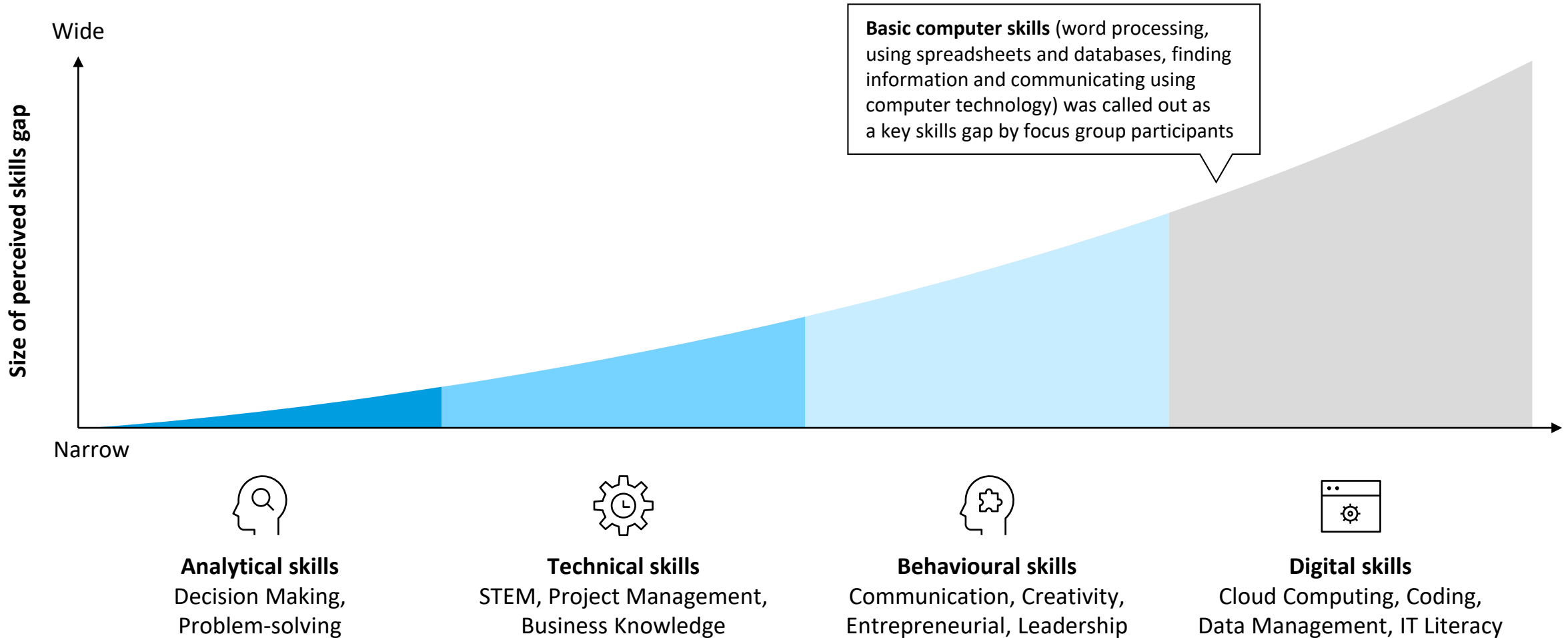


60%

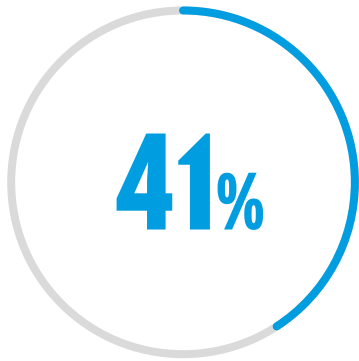
Of youth (71% in SSA; 51% in MENA) will need to acquire relevant work experience if they are to secure employment in either the public or private sector



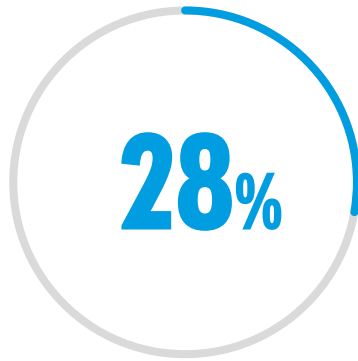
DIGITAL AND BEHAVIOURAL SKILLS GAPS ARE THE WIDEST IN THE SSA LABOUR MARKET AS OBSERVED BY EMPLOYERS



ALREADY IDENTIFIED AS THE WIDEST SKILLS GAP BY EMPLOYERS, YOUTH IN SUB-SAHARAN AFRICA FIND IT MOST CHALLENGING TO ACQUIRE DIGITAL SKILLS



Of SSA youth find it difficult to acquire digital skills ranging from basic computer skills and IT literacy to advanced technological, data and coding skills



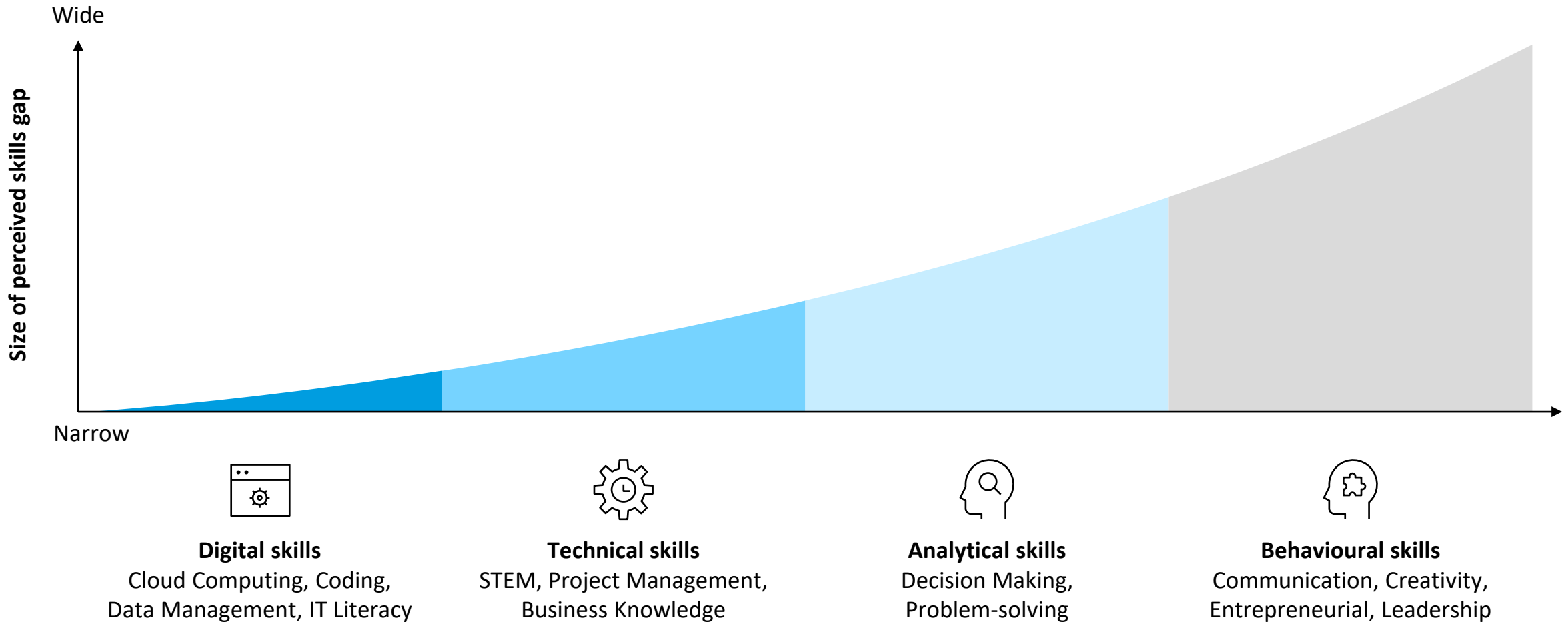
Of MENA youth find it difficult to acquire digital skills



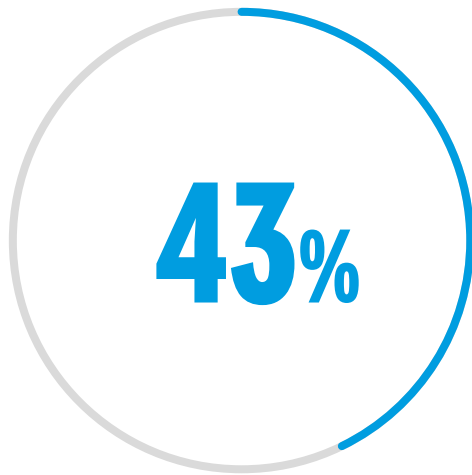
Currently the biggest issue is the youth's limited IT and computer literacy. They struggle to gain access to computers. Sometimes they don't know how to even use computers. As such, we have been obliged to include IT and computer literacy in the curriculum of our work-readiness programs.

Junior Achievement work-readiness program facilitator; focus group participant

BEHAVIOURAL AND ANALYTICAL SKILLS GAPS ARE THE WIDEST IN THE MENA LABOUR MARKET AS OBSERVED BY EMPLOYERS



DESPITE BEING THE WIDEST SKILL GAP AS OBSERVED BY EMPLOYERS, YOUTH IN MENA BELIEVE THAT BEHAVIOURAL SKILLS ARE THE EASIEST TO ACQUIRE



Of MENA youth believe it is easy to acquire behavioural skills as it pertains to issues of professionalism, attitude, resilience and professional EQ



We require communication skills and listening skills. A lot of youths lack understanding and have a fear asking questions.

HR Manager and CSR Champion;
focus group participant

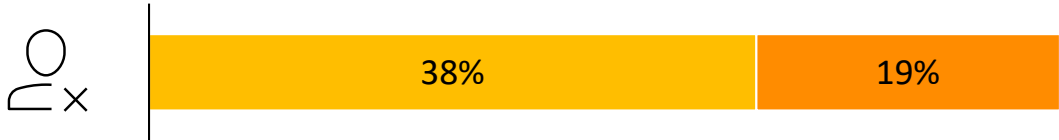
FINANCIAL CONSTRAINTS AND LACK OF CAREER GUIDANCE DETER YOUTH FROM ACCESSING TRAINING AND EDUCATIONAL PROGRAMS

Top five challenges faced by youth preventing them from gaining access to education and skills training

Lack of financial resources



Corruption/nepotism



Lack of career guidance



Not enough information available



Distance/transportation issues

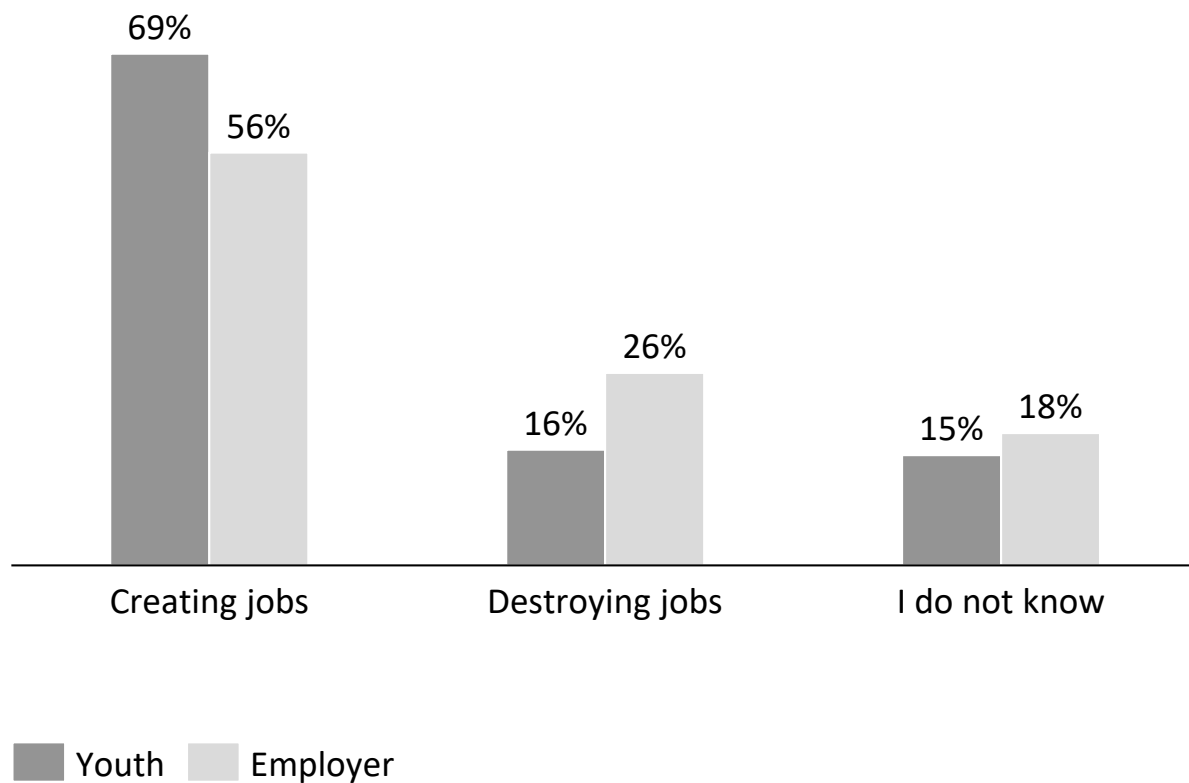


SSA MENA

Responses do not add up to 100%; respondents could select more than one answer

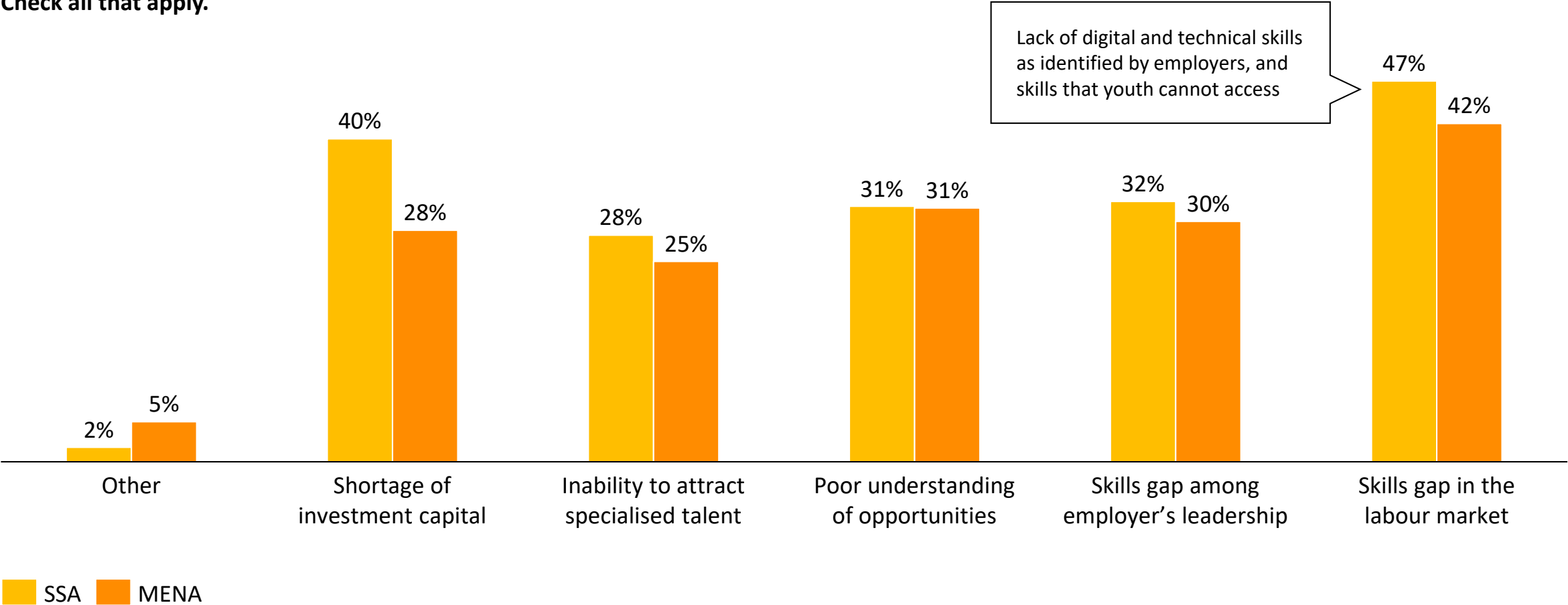
MAJORITY OF EMPLOYERS AND YOUTH BELIEVE THAT TECHNOLOGY HAS THE POTENTIAL TO CREATE JOBS ACROSS REGIONAL MARKETS

What impact do you think technology has had on job creation in your country?



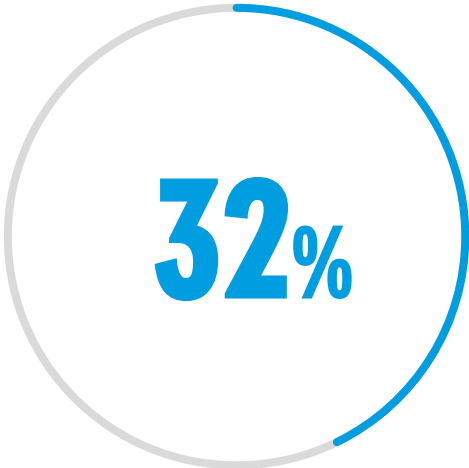
HOWEVER, DUE TO THE DIGITAL SKILLS GAP IN THE MARKET, ORGANISATIONS SHY AWAY FROM ADOPTING NEW TECHNOLOGIES

What are the perceived barriers to the adoption of new technologies in your industry?
Check all that apply.



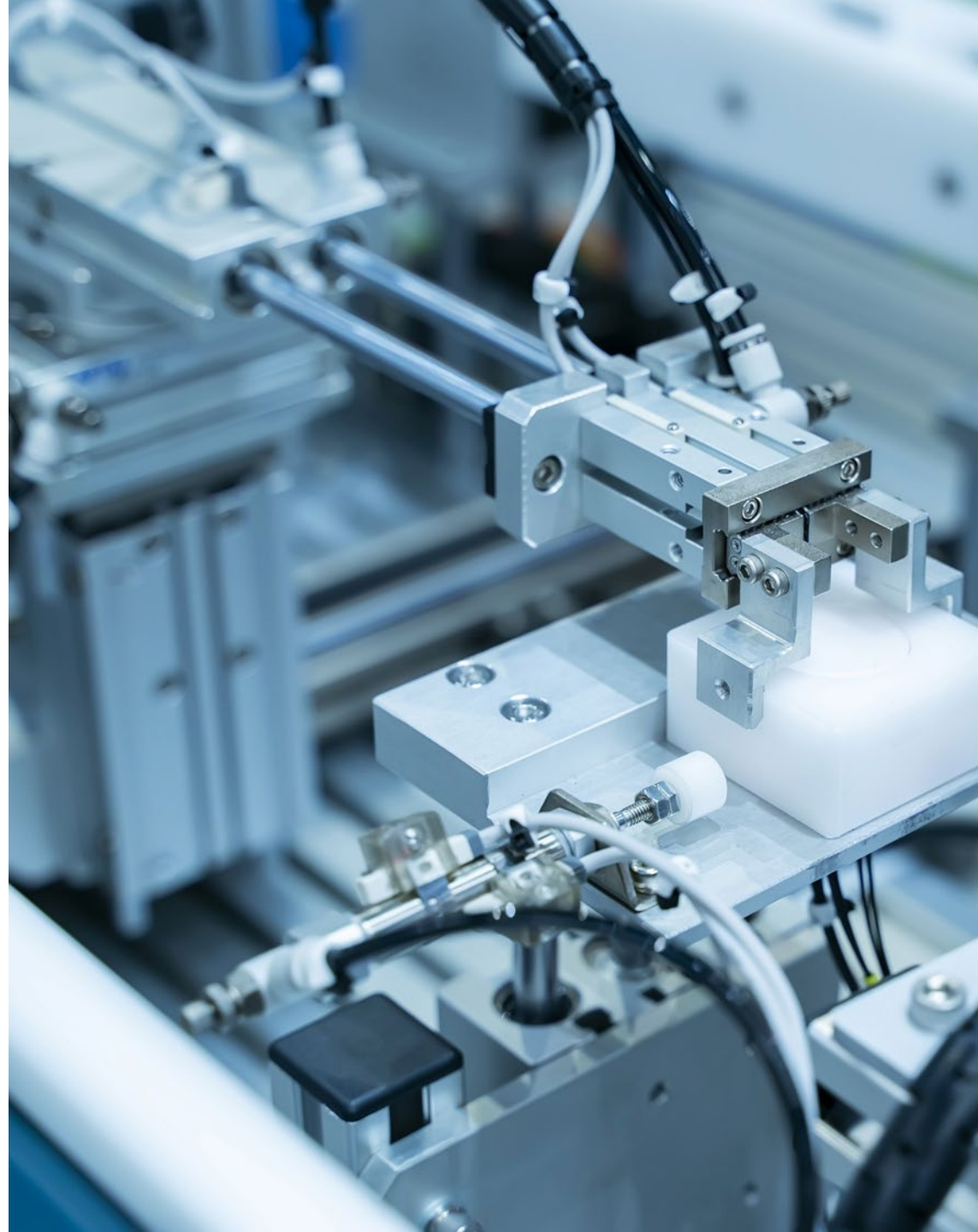
Responses do not add up to 100%; respondents could select more than one answer

FURTHERMORE, TECHNOLOGICAL INTEGRATION AND AUTOMATION WILL REDUCE THE SIZE OF WORKFORCES AND JOB VACANCIES



32%

Of employers (37% in SSA; 28% in MENA) expect to see a reduction in the workforce by 2025 and post COVID-19 due to the impact of technological integration and automation

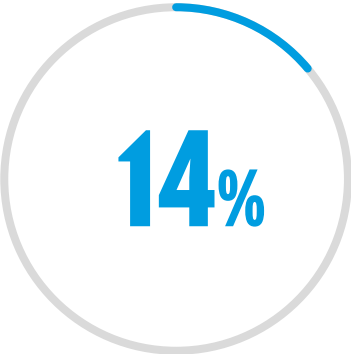
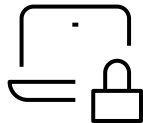


LACK OF TECHNOLOGY-RELATED SKILLS IS A KEY DRIVER FOR LOW LEVELS OF JOB ACQUISITION AND RETENTION AMONG YOUTH



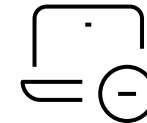
29%

Of youth (38% in SSA; 24% in MENA) believe that their lack of proficiency in technology related skillsets (technology use, monitoring, control, design & programming) has caused them to miss out on job opportunities



14%

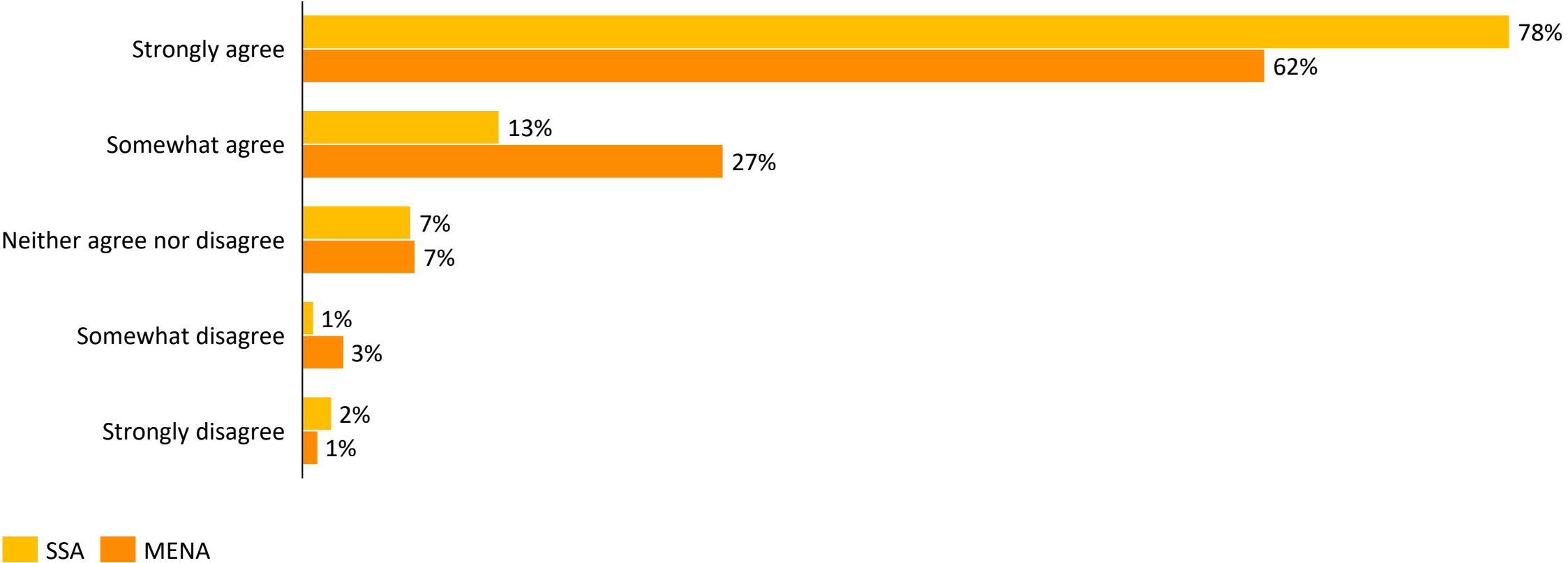
Of youth (16% in SSA; 13% in MENA*) believe that their lack of proficiency in technology related skillsets (technology use, monitoring, control, design & programming) has contributed to their unemployment by way of retrenchments and redundancy



* 48% and 46% of youth respondents in SSA and MENA have not lost jobs due to a skills gap

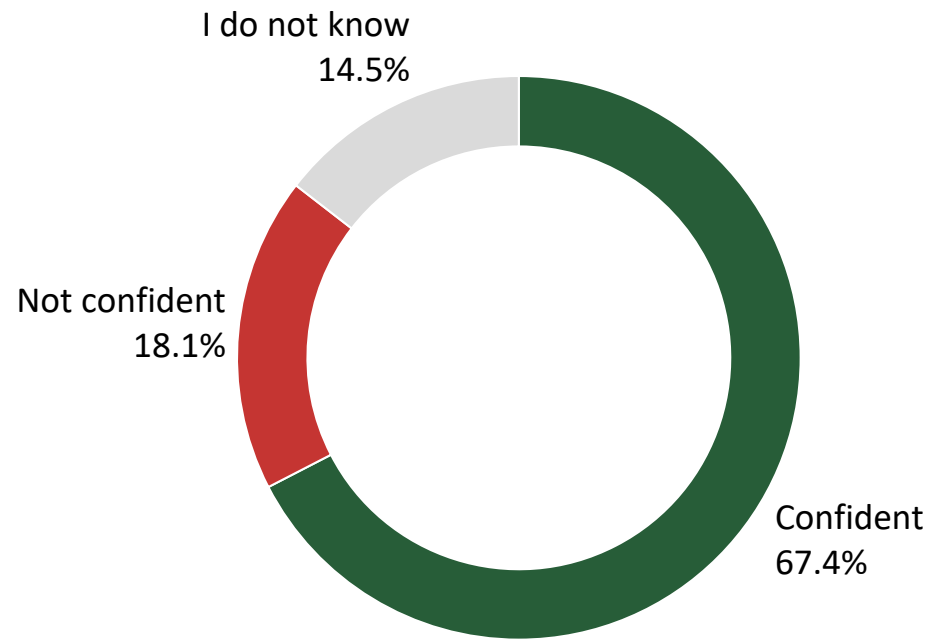
YOUTH STRONGLY BELIEVE THAT THEY REQUIRE UPSKILLING AND UPDATED EDUCATION IN ORDER TO BECOME AND REMAIN RELEVANT IN THE MARKET

To what extent do you agree with the following statement: “My current education and skills need to be updated in the upcoming years to adapt to ever changing labour market requirements”?



DESPITE THE CHALLENGES, THE MAJORITY OF EMPLOYERS ARE CONFIDENT IN THEIR ORGANISATION'S ABILITY TO IMPROVE YOUTH EMPLOYMENT AND UTILISATION

How confident are you in your organisation's ability to contribute to efforts to reduce youth unemployment and labour underutilization?



Uncertainty and lack of job security has caused 18.1% of employers to be pessimistic

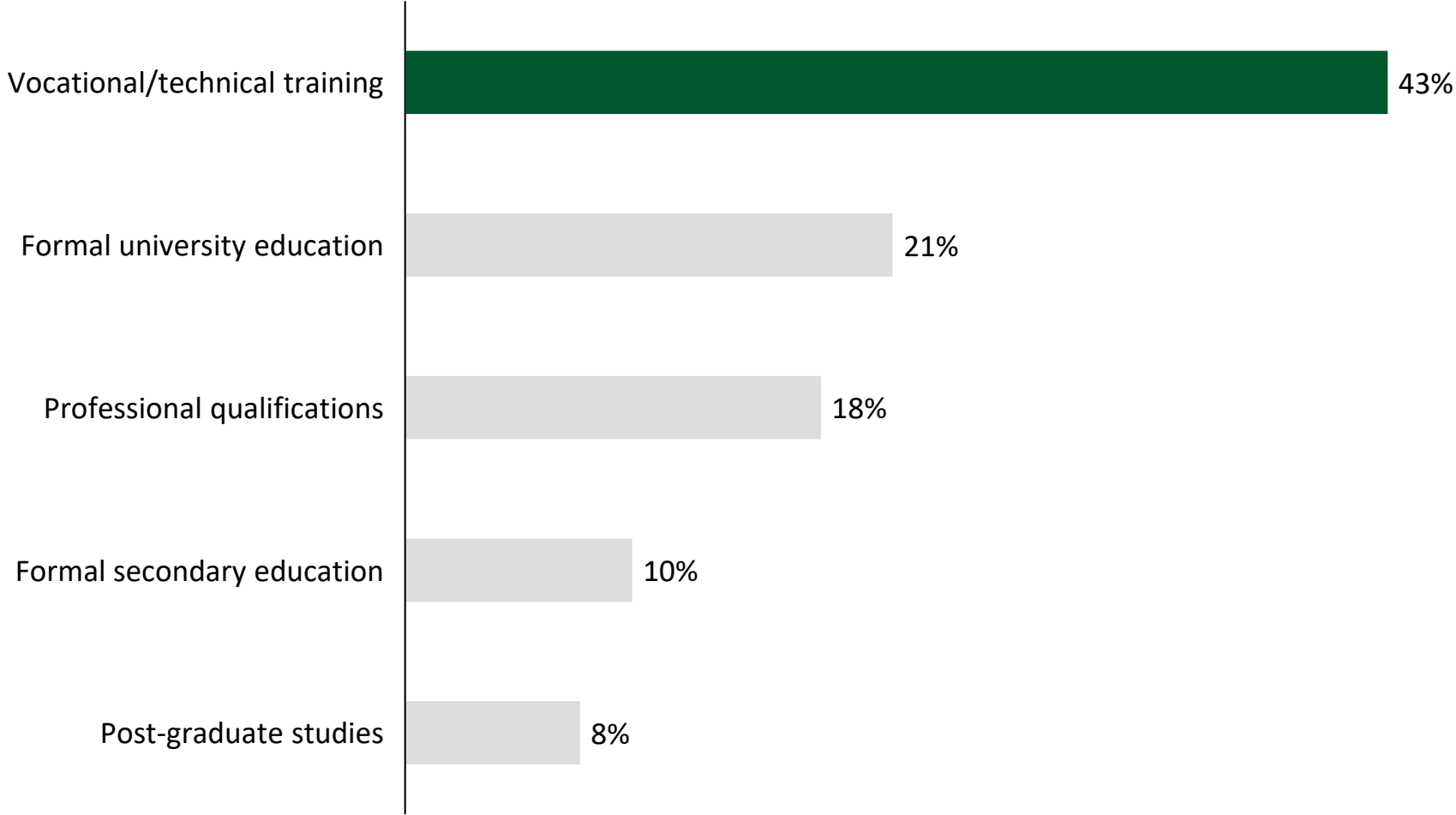


In our organization we will always support youth and provide them with proper trainings and skills set needed to be prepared for the job. We collaborate with private sector and NGOs to promote and support our mission.

Education employer;
employer survey respondent

EMPLOYERS ARE CONFIDENT IN THE EDUCATION SYSTEM (PARTICULARLY VOCATIONAL TRAINING) AND IT'S ABILITY TO ADDRESS THE SKILLS GAP

Which type of education do you believe plays the biggest role in addressing the skills gap?

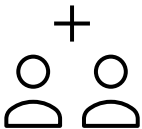
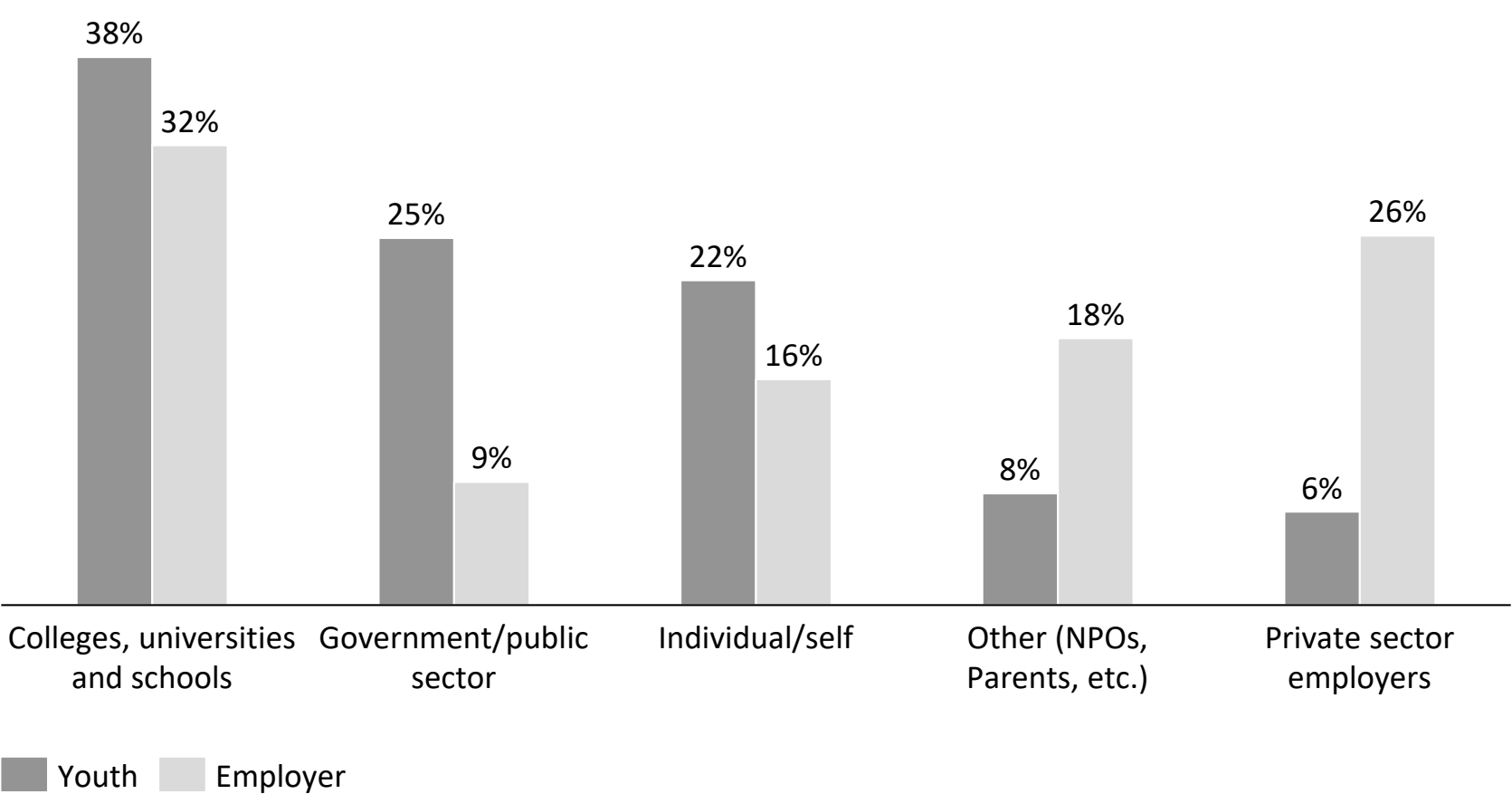


54%

Of employers believe in the education system's ability to narrow the skills gap

FURTHERMORE, YOUTH AND EMPLOYERS ALIKE, BELIEVE THAT EDUCATIONAL INSTITUTIONS ARE BEST PLACED TO PREPARE YOUTH FOR FUTURE JOBS

Who do you think should be responsible for preparing the youth for future jobs?



Youth and employers also believe that they themselves are responsible for developing and preparing youth for the future workforce

DESPITE THE CALL FOR VOCATIONAL TRAINING, BACHELOR DEGREES ARE REQUIRED MORE THAN VOCATIONAL CERTIFICATES FOR ENTRY-LEVEL JOBS IN THE WORKFORCE



Of employers require, as the minimum level of education, bachelor degrees for entry-level jobs



Of employer-led priority youth skills development programs are targeted at university students



18%

Of employers' entry-level jobs require a technical and/or vocational certificate to qualify

EMPLOYERS AND YOUTH BELIEVE THAT PRACTICAL WORK OPPORTUNITIES BEST PREPARE YOUTH FOR THE WORKPLACE



Of employers believe that internships and learnerships provide the best preparation for the workplace



Of youth (81% in SSA; 68% in MENA) believe that practical internships and learnerships provide the best preparation for the workplace



35%

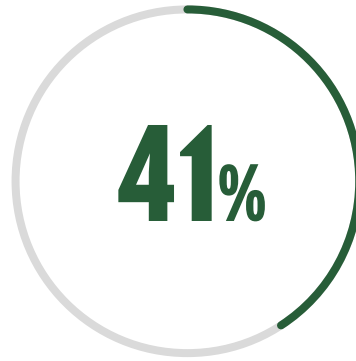
Of employers believe work-readiness programs produce work-ready youth

MAJORITY OF EMPLOYERS RUN THEIR OWN PROPRIETARY YOUTH SKILLS DEVELOPMENT PROGRAMS



Of employers (67% in SSA; 52% in MENA) run their own proprietary youth skills development programs

48% of employers run partner youth skills development programs with NPOs



Of youth skills development programs run by employers are work-placement opportunities consisting of internships, on-the-job training, graduate and training programs

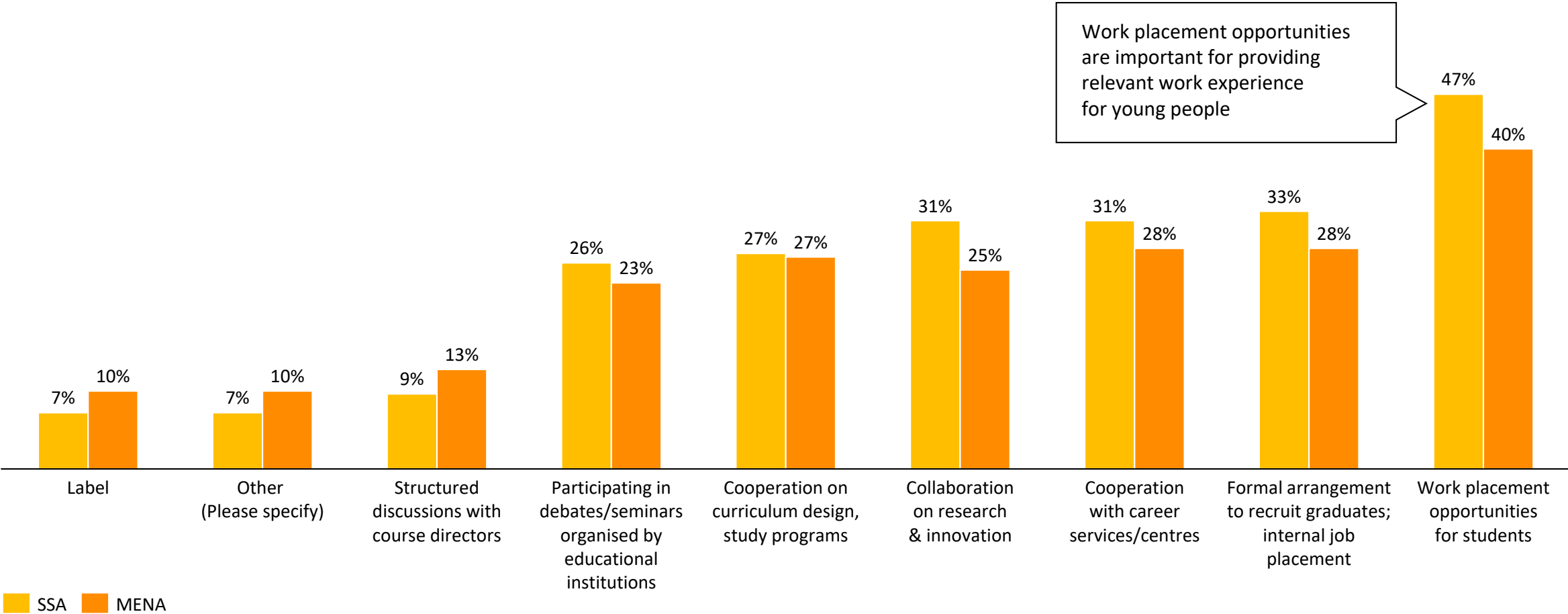


There is so much incentive for employers to run youth skills development programs. The skills pool and succession pool that one builds is an obvious incentive. From an HR perspective, you want to spend less time recruiting and training outside talent, especially if you can create a ready pool of talent in-house.

Human Resources Manager;
focus group participant

WORK-PLACEMENT OPPORTUNITIES ARE ALSO THE MOST POPULAR EMPLOYER-EDUCATOR COLLABORATION FOR PREPARING YOUNG PEOPLE FOR FUTURE JOBS

How do you partner and collaborate with secondary and tertiary education institutions?



Responses do not add up to 100%; respondents could select more than one answer

FOR STAFFED EMPLOYEES, EMPLOYERS PROVIDE UP- AND RESKILLING OPPORTUNITIES TO ENSURE THE RELEVANCE OF SKILLS IN THEIR WORKFORCE



Of employers (59% in SSA; 65% in MENA) have internal learning and development structures within their organisations to respond quickly to a shift in skills needs



The availability of new and improved technology will cause a shift in the way things are done. Only those who reskill and upskill will be able to stay up to date and maximize the opportunities presented by this improved technology.

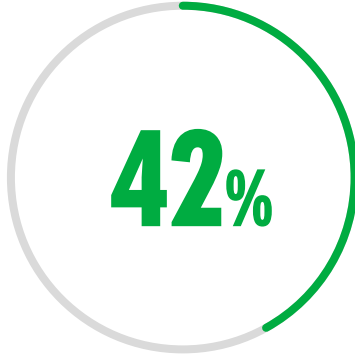
Professional services employee;
Survey respondent

SSA AND MENA YOUTH WERE ECONOMICALLY IMPACTED TO VARYING DEGREES BY THE COVID-19 PANDEMIC



56%

Of **SSA** youth who were employed before the COVID-19 outbreak either lost paying jobs, lost their own businesses or were furloughed



42%

Of **MENA** youth also lost gainful employment or were put on temporary leave



31%

Of employed **MENA** youth continued to work as per normal or work from home after the COVID-19 outbreak



16%

Of **SSA** youth continued as per normal

SINCE THE COVID-19 OUTBREAK EMPLOYERS AND YOUTH HAVE EXPERIENCED INCREASED DIFFICULTY IN CREATING AND FINDING JOBS, RESPECTIVELY



Of employers (59% in SSA; 65% in MENA) have experienced increased difficulty in creating jobs since the COVID-19 pandemic

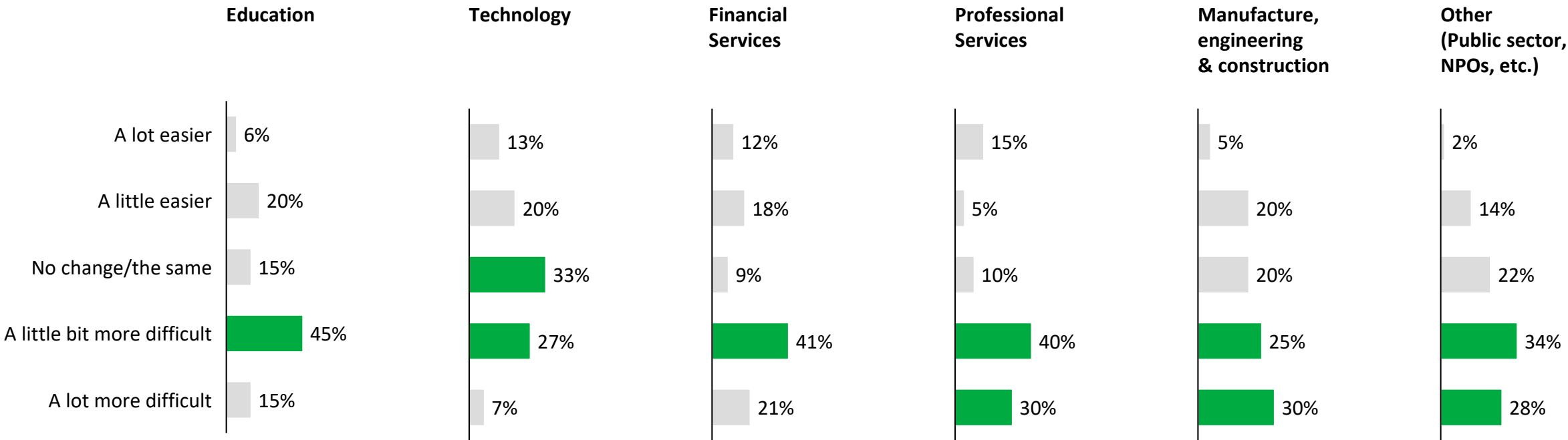


Of youth (83% in SSA; 61% in MENA) who were job-seekers before the COVID-19 outbreak have experienced increased difficulty in finding employment



JOB CREATION HAS BEEN MADE INCREASINGLY DIFFICULT ACROSS ALL INDUSTRIES BY THE COVID-19 PANDEMIC

In comparison to before the COVID-19 outbreak, how much more easy/difficult is it to create jobs?



Industries that are more technologically inclined i.e., technology and manufacturing sectors, have experienced less difficulty than other industries in creating jobs during the COVID-19 pandemic

CONTACTS

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