

NEW FORMS OF WORK AND PLATFORM WORK IN SEMED

Country profile: Lebanon

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Setting the scene

Main economic indicators

Lebanon is a lower-middle income country¹ with GDP worth around USD 21.6 billion.² The country's economy is dominated by the service sector, which accounted for around 94% of the country's GDP in 2021. The industrial and agricultural output of the country has plummeted in recent years with the GDP share of industry and agriculture dropping from around 16% and 3% to a mere 3% and 1%, respectively.³

For many years, the Lebanese economy has endured the drawbacks of successive political crises which have paralysed its institutions and left the economy on the brink of collapse.⁴ This dire economic situation has a disastrous effect on the lives of Lebanese people. In 2022, Lebanon had one of the highest inflation rates globally, reaching over 171%.⁵ In parallel, the informal sector grew to a staggering 30% of the economy. Furthermore, according to the 2022 UN policy brief, 82% of Lebanon's population lives in multidimensional poverty, which, in addition to income factors, takes into account access to health, education and public utilities.⁶ Despite these detrimental effects on the economy and the population, there does not appear to be any resolution in sight.⁷

As a result of the harsh economic conditions that are causing a lack of jobs and a constant state of persistent insecurity, many Lebanese nationals decided to emigrate.⁸ Although there are no reliable statistics on the number of Lebanese citizens who have actually emigrated since the economic crisis, it is estimated that the figures are high. This new wave of emigration only adds to the historically large Lebanese diaspora. According to some estimates, the Lebanese diaspora could range from 4 to 14 million people, which is disproportionately large compared to the approximate 5.6 million citizens currently living in the country.⁹ The main destination countries for Lebanese emigrants are developed economies such as Saudi Arabia, United States of America, Australia, Canada, Germany, France and the United Arab Emirates.¹⁰

Consequently, although there are no reliable data, the country is struggling with a terminal brain drain. According to surveys, around 77% of Lebanese youth wish to leave the country. The health sector is the most affected by this brain drain with around 20% of doctors leaving or intending to leave the country.

¹ World Bank Blogs (2022). New World Bank country classifications by income level: 2022-2023.

<https://blogs.worldbank.org/opendata/new-world-bank-country-classifications-income-level-2022-2023>

² World Bank (2023). Macro Poverty Outlook: Lebanon.

<https://thedocs.worldbank.org/en/doc/65cf93926fdb3ea23b72f277fc249a72-0500042021/related/mpo-lbn.pdf>

³ Statista (2023). Lebanon: Share of economic sectors in the gross domestic product (GDP) from 2011 to 2021.

<https://www.statista.com/statistics/455263/share-of-economic-sectors-in-the-gdp-in-lebanon/>

⁴ World Bank (2022). The Lebanese crisis: a great denial against a backdrop of deliberate depression (*La crise libanaise : un grand déni sur fond de dépression délibérée*). <https://www.banquemonde.org/fr/news/press-release/2022/01/24/lebanon-s-crisis-great-denial-in-the-deliberate-depression>

⁵ World Bank (2023). Macro Poverty Outlook: Lebanon.

<https://thedocs.worldbank.org/en/doc/65cf93926fdb3ea23b72f277fc249a72-0500042021/related/mpo-lbn.pdf>

⁶ UNESCWA (2021). Multidimensional poverty in Lebanon (2019-2021) Painful reality and uncertain prospects.

https://www.unescwa.org/sites/default/files/news/docs/21-00634-_multidimensional_poverty_in_lebanon_-_policy_brief_-_en.pdf

⁷ World Bank (2023). Lebanon Economic Monitor, Spring 2023: The Normalization of Crisis Is No Road for Stabilization. <https://www.worldbank.org/en/country/lebanon/publication/lebanon-economic-monitor-spring-2023-the-normalization-of-crisis-is-no-road-for-stabilization>

⁸ Arab Barometer (2022). Half of Lebanese consider migrating. <https://www.arabbarometer.org/2022/04/what-lebanese-citizens-think-about-migration/>

⁹ Chr. Michelsen Institute (2022). EFFEXT Background Paper – National and international migration policy in Lebanon. <https://www.cmi.no/publications/8589-national-and-international-migration-policy-in-lebanon>

¹⁰ ETF (2021). Skills and Migration Country Fiche Lebanon. https://www.etf.europa.eu/sites/default/files/2022-04/etf_skills_and_migration_country_fiche_lebanon_2021_en.pdf

Likewise, high numbers of nurses and pharmacists also intend to leave. Emigration is also widespread among other occupational profiles such as engineers and professors.¹¹

Not only is Lebanon suffering from high rates of emigration, but it also receives the largest number of immigrants globally. With a population of 5.6 million, Lebanon is hosting an estimated 1.5 million Syrian refugees and about 257,000 Palestinian refugees.¹² This amounts to more than one quarter of the Lebanese population, which represents one of the highest shares of refugees relative to the population globally.¹³

Labour market

The dire economic situation in Lebanon is accompanied by a troubled labour market. In addition to the low activity rate and employment, the labour market is also plagued by high informality. Due to high emigration and brain drain on the one hand and immigration on the other, the labour market is faced both with a shortage of qualified labour as well as a surplus of immigrant workers unable to enter the labour force.

Labour market activity in 2022 was only 43.4% of the population. Although women represent more than half of the population (51.5%¹⁴), only 22.2% were active on the labour market, compared to 66.2%¹⁵ of men.

The national unemployment rate among the working age population was around 29.6% in 2022. This figure was 32.7% for women and 28.4% for men, which is comparable to most of the countries in the SEMED region.¹⁶ Although there is a significant gender gap in unemployment, the difference between men and women in unemployment rates is significantly lower than the difference in general labour market activity.

Undeclared or informal work is one of the main challenges facing the Lebanese labour market. In 2022 informal employment stood at a staggering 62.4%.¹⁷ The sectors with the highest share of informal employment were agriculture, fishing and forestry, which accounted for 98.1% of total employment.¹⁸

Youth statistics

Because of the enduring economic crisis, Lebanese youth are faced with a lack of educational opportunities and job opportunities. This is one of the main reasons for the high emigration rate among the youth.¹⁹

The youth unemployment rate in Lebanon is one of the highest in the SEMED region and was 47.8% in 2022.²⁰ The situation with NEETs (Not in Education, Employment, or Training) is not much better. In 2022, 29.1% of 15–24-year-olds in Lebanon were neither in employment nor in education and training. The share of NEETs among males was 26.1% and 32.1% among females.²¹

¹¹ ForeignPolicy.com (2021). Lebanon Is in Terminal Brain Drain. <https://foreignpolicy.com/2021/08/09/lebanon-terminal-brain-drain-migration/>

¹² Norwegian Refugee Council (2022). NRC in Lebanon. <https://www.nrc.no/countries/middle-east/lebanon/>

¹³ IOM (2022). World Migration Report 2022. <https://worldmigrationreport.iom.int/wmr-2022-interactive/>

¹⁴ World Bank (2022). Population, female (% of total population) – Lebanon.

<https://data.worldbank.org/indicator/SP.POP.TOTL.FE.ZS?locations=LB>

¹⁵ ETF KIESE database (2022).

¹⁶ ETF KIESE database (2022).

¹⁷ ILO (2022). Lebanon follow-up Labour Force Survey.

https://www.ilo.org/beirut/publications/WCMS_848353/lang--en/index.htm

¹⁸ ILO (2022). Lebanon follow-up Labour Force Survey.

https://www.ilo.org/beirut/publications/WCMS_848353/lang--en/index.htm

¹⁹ ForeignPolicy.com (2021). Lebanon Is in Terminal Brain Drain. <https://foreignpolicy.com/2021/08/09/lebanon-terminal-brain-drain-migration/>

²⁰ ETF KIESE database (2022).

²¹ ETF KIESE database (2022).

Lebanese youth is also suffering from a lack of educational opportunities due to the poor quality of the VET system and its misalignment with the labour market. The low quality of the VET system can be attributed to the lack of practical knowledge, work-based learning and synchronisation with industry needs.²² This leads to significant mismatches in the labour market and consequent unemployment. According to other research, 32% of youth at work are in occupations which are below their level of qualifications, and 21% are in jobs which require qualifications above their level of education,²³ indicating a high level of mismatch.

Internet and digitalisation

Lebanon suffers from poor internet infrastructure, high costs of internet and lack of international payment systems, all of which significantly hamper the development of digital economy in the country.

Although around 87% of the population has access to the internet, due to a malfunctioning electricity sector and fuel shortages, Lebanese households suffer from constant power outages, that significantly limit their internet access.²⁴ Moreover, due to poverty, many families in Lebanon do not have access to electronic and digital devices, particularly computers.²⁵ There is also an issue of inequality in accessing digital services, with those citizens who possess generators having easier and more regular access to the internet.

Lebanon has exceptionally low average internet speed. According to the Speedtest Global Index, Lebanon ranks 170th out of 182 countries in terms of fixed broadband speed, with an average download speed of just 7.58 Mbps. Mobile internet speed fares slightly better (28.06 Mbps), with Lebanon ranking 82nd out of 145 countries, but still lagging behind the global average of 42.07 Mbps.^{26,27} One of the main reasons for Lebanon's poor internet performance is the country's outdated infrastructure. Most internet connections in Lebanon are provided through DSL (Digital Subscriber Line) technology, which uses existing copper telephone lines to provide internet access.²⁸ This technology is slow and unreliable, with a tendency to damage and disruption.

As well as low internet quality, Lebanese internet services are also characterised by high costs.²⁹ This is mainly attributed to the lack of competition among internet service providers.³⁰ The state-owned telecommunications company, Ogero, has a monopoly over the country's fixed broadband

²² ILO (2023). Skills Anticipation – Lebanon. Compiled Sectoral Analysis Report.

https://www.ilo.org/wcmsp5/groups/public/---arabstates/---ro-beirut/documents/publication/wcms_881400.pdf

²³ World Bank (2021). Foundations for Building Forward Better: An Education Reform Path for Lebanon.

<https://documents1.worldbank.org/curated/en/627001624033308257/pdf/Foundations-for-Building-Forward-Better-An-Education-Reform-Path-for-Lebanon.pdf>

²⁴ The share of households without electricity is estimated at 54%, which is 650,000 out of 1.2 million households.

UNESCWA (2021). Multidimensional poverty in Lebanon (2019-2021) Painful reality and uncertain prospects.

https://www.unescwa.org/sites/default/files/news/docs/21-00634-multidimensional_poverty_in_lebanon_policy_brief_en.pdf

²⁵ PWC (2022). Bridging the Digital Gap: The state of digital inclusion in the MENA region.

<https://www.pwc.com/m1/en/publications/documents/bridging-digital-gap-state-digital-inclusion-mena-region.pdf>

²⁶ Speedtest.net. Speedtest Global Index. Median Country Speeds October 2023.

<https://www.speedtest.net/global-index>

²⁷ Statista (2023). Average global broadband download & upload speed worldwide as of April 2023.

<https://www.statista.com/statistics/896779/average-mobile-fixed-broadband-download-upload-speeds/>

²⁸ Moultonborough.org (2022). Why Is Internet In Lebanon Slow? Reasons Include Lack Of Development

Government Restrictions And Lack Of Competition. <https://www.moultonborough.org/why-is-internet-in-lebanon-slow-reasons-include-lack-of-development-government-restrictions-and-lack-of-competition/>

²⁹ L'Orient Today (2023). Cabinet approves sevenfold increase in internet, fixed call tariffs.

<https://today.lorientlejour.com/article/1345364/caretaker-government-approves-sevenfold-increase-internet-fixed-call-tariffs.html>

³⁰ FreedomHouse.org (2023). Lebanon: Freedom on the Net 2022 Country Report.

<https://freedomhouse.org/country/lebanon/freedom-net/2022>

infrastructure, while the mobile market is dominated by two state-run operators, Alfa and MTC Touch.³¹ This lack of competition has led to high prices for consumers – among the highest in the region.³²

Lebanon also suffers from limited access to international payment systems. Although there are payment platforms available for Lebanese businesses and individuals such as Pinpay, Netcommerce, CMO and Cashu,³³ some of the most popular worldwide platforms such as PayPal and Skrill are not available in the country. The main reason for this are the restrictive local regulations that limit the operation of the payment platforms.³⁴

³¹ Logcluster.org. Lebanon Telecommunications. Digital Logistics Capacity Assessments.

<https://dlca.logcluster.org/lebanon-34-telecommunications#:~:text=Lebanon%20has%20two%20mobile%20operators,government%20Downed%20operator%2C%20Ogero>.

³² Atlasandboots.com (2023). Ranked: countries with the cheapest internet in the world 2023.

<https://www.atlasandboots.com/remote-work/countries-with-the-cheapest-internet-world/>

³³ Lebanese Ministry of Economy & Trade. Online payment platforms for SMEs and Start-ups.

<https://www.economy.gov.lb/en/services/support-to-smes/online-payment-platforms-for-smes-and-start-ups>

³⁴ TechMagazine (2020). PayPal in Lebanon. Everything you need to know. <https://techmgzn.com/paypal-in-lebanon-everything-you-need-to-know/>

Online work on and off digital labour platforms

The last decade has witnessed significant growth of online and platform work in Lebanon. Although these new forms of work have become more visible in the Lebanese media space, they have not received much attention from government bodies.

Prevalence of online work

Based on data provided by the OLI,³⁵ online platform work activity in Lebanon fluctuated significantly from 2017 to 2023, but the volume of work on the first and last measurement remained the same. Worker activity was comparatively high until the second half of 2019, when it peaked and then experienced a sudden drop. Another drop occurred at the end of 2022, effectively returning Lebanese online platform work activity to the 2017 level. It is unclear what caused this abrupt decline in online work activity, but it is possible that it is a consequence of the economic crisis.

Despite the decline in activity, the volume of platform work in Lebanon is high. In the measured period, the volume of platform work in Lebanon accounted for around 0.32% of the global share on the measured platforms. This makes Lebanon the second largest supplier of online work in the SEMED region, just behind Egypt.³⁶

Figure 1. Change in engagement of Lebanese online platform workers over time relative to June 2017



Source: Online labour index.³⁷

Note: The graph presents the percentage change between the number of active workers from Lebanon on a specific day compared to the number of active workers at the start of data collection in 2017, which is used as a reference date. This graph

³⁵ ILO. Online Labour Index 2020. <http://onlinelabourobservatory.org/oli-supply/>
³⁶ ILO. Online Labour Index 2020. <http://onlinelabourobservatory.org/oli-supply/>
³⁷ ILO. Online Labour Index 2020. <http://onlinelabourobservatory.org/oli-supply/>

was based on OLI data which calculated a weighted estimate of currently active workers by periodically sampling workers on five of the largest online platforms once every 24 hours. These platforms include Upwork, Freelancer, Fiverr, PeoplePerHour and MTurk.³⁸

Data for this study collected on the Freelancer, PeoplePerHour and Guru platforms suggests a low activity of Lebanese online platform workers in 2023. Among the 4,112 registered online workers from Lebanon across three targeted platforms, only 4% can be considered active.³⁹ Most active workers (82%) are registered on Freelancer, while 18% are on PeoplePerHour. None of the workers are active on Guru. It is important to note that this is only a fraction of online platform workers in Lebanon and that they are also working on other global and local online labour platforms.⁴⁰

Apart from the platforms analysed above, Lebanese freelancers work on several international English and Arabic language platforms. Some of the most popular digital labour platforms are Upwork, Freelancer, Guru, Toptal, PeoplePerHour, 99designs, Workana and Mostaq. One of the major platforms Fiverr is banned in Lebanon due to the fact that it is headquartered in Israel.

According to the interviews,⁴¹ those who work outside of the digital platforms find freelance jobs on social media and online communities, job search websites such as Tanqeeb or through word-of-mouth referrals.

Attractiveness of online work

Based on the interviews conducted for this study,⁴² the primary incentive for engaging in online work is the need to improve one's livelihood following the devaluation of the Lebanese currency or to supplement one's income alongside their regular income. However, there are several major barriers preventing the further development of online work in Lebanon. As mentioned in the previous section, freelancers are faced with weak ICT infrastructure, low internet speed, high prices for internet subscriptions,⁴³ poor electricity supply and frequent power cuts, as well as issues related to e-payment. Additionally, a poor regulatory environment prevents many people, particularly refugees, from online platform work.⁴⁴

Online work occupations and worker profiles

There is a lack of data on the profiles of online platform workers in Lebanon. Our findings suggest that most of the Lebanese online platform workers are young, male and work in creative and IT occupations.

There is an uneven distribution of occupations among Lebanese online platform workers, as shown in the figure below. The majority of workers are engaged in creative and multimedia work, accounting for 42% of the total share. The software development and technology work follows with 21%. The remaining workers are distributed across the following occupations: writing and translation, clerical and data entry, professional services, and sales and marketing support.

³⁸ The findings are limited to the five globally popular online labour platforms and exclude other popular platforms in the region, primarily Arabic language ones such as Mostaq or Ureed.

³⁹ Active workers are considered those who completed at least one task on the digital platforms.

⁴⁰ These platforms were selected for the analysis because they were the most popular English language platforms that we could apply web scraping techniques to.

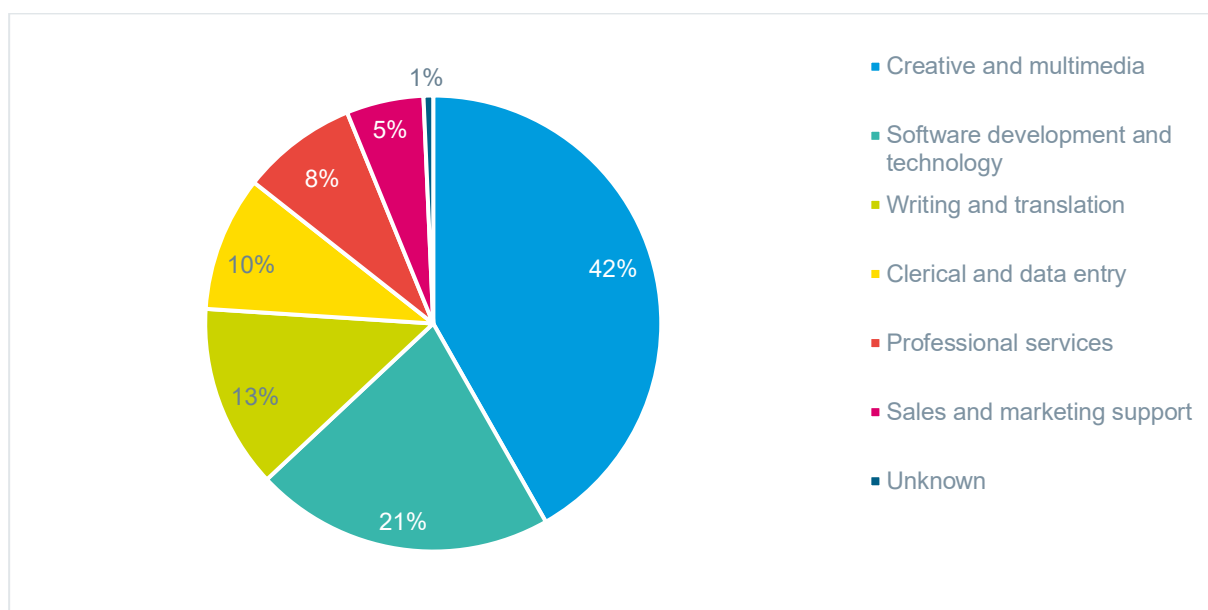
⁴¹ Interview with Mr. Farid Khalil, 12.06.2023.

⁴² Interview with Mr Farid Khalil, 12.06.2023.

⁴³ Karim Mehrej & Maysa Baroud. The Digital Economy as an Alternative in Lebanon: Focus on Micro and Small, and Medium Enterprises. 2020. https://www.aub.edu.lb/ifi/Documents/publications/policy_briefs/2020-20/20210201_The_Digital_Economy_as_an_Alternative_in_Lebanon.pdf

⁴⁴ Sagepub.com (2023). Online work as humanitarian relief? The promise and limitations of digital livelihoods for Syrian refugees and Lebanese youth during times of crisis. <https://journals.sagepub.com/doi/epdf/10.1177/0308518X231184470>

Figure 2. Distribution of occupations among active online platform workers

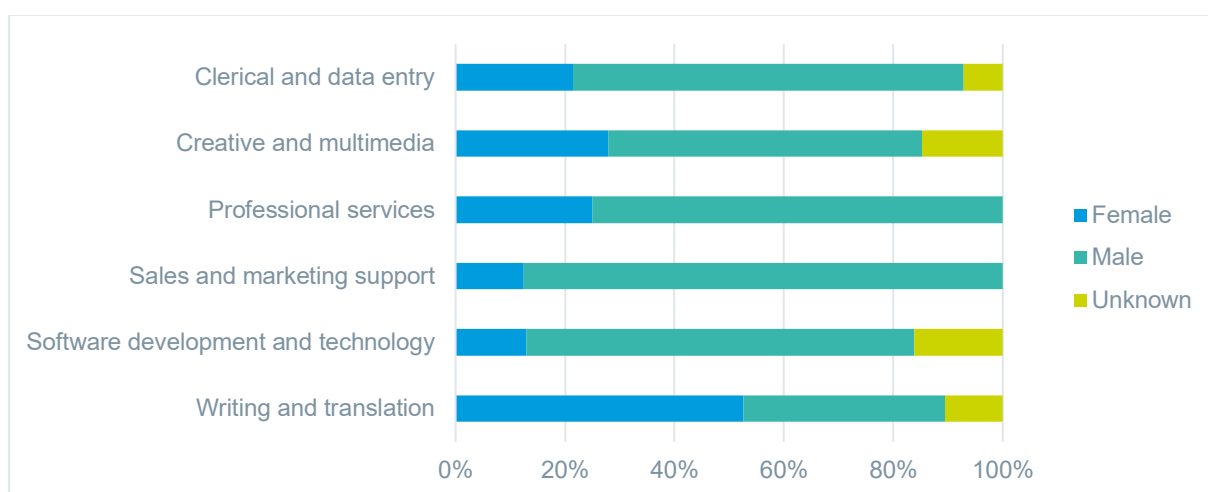


Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Note: 'Unkown' category shows worker profiles for which occupation could not be identified.

Most of the active online platform workers in Lebanon are men. Data collected from platforms indicates that men are more than two times likely to work on platforms compared to women. However, this represents one of the lowest gender gaps in the proportion of active online platform workers in the SEMED region. Men still dominate all of the occupations, apart from writing and translation, where most of the active workers are women. Of the remaining male dominated occupations women have significant representation in creative and multimedia, professional services and clerical and data entry while they are least represented in software and technology and sales and marketing support.

Figure 3. Gender distribution of active online platform workers by occupation



Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Note: 'Unknown' category shows worker profiles for which gender could not be identified.

According to the interviews conducted for this study, online platform workers can come from every walk of life and age, but the majority of them are young. Online platform workers in Lebanon can be students trying to make pocket money, highly skilled professionals with platform work as either their primary or

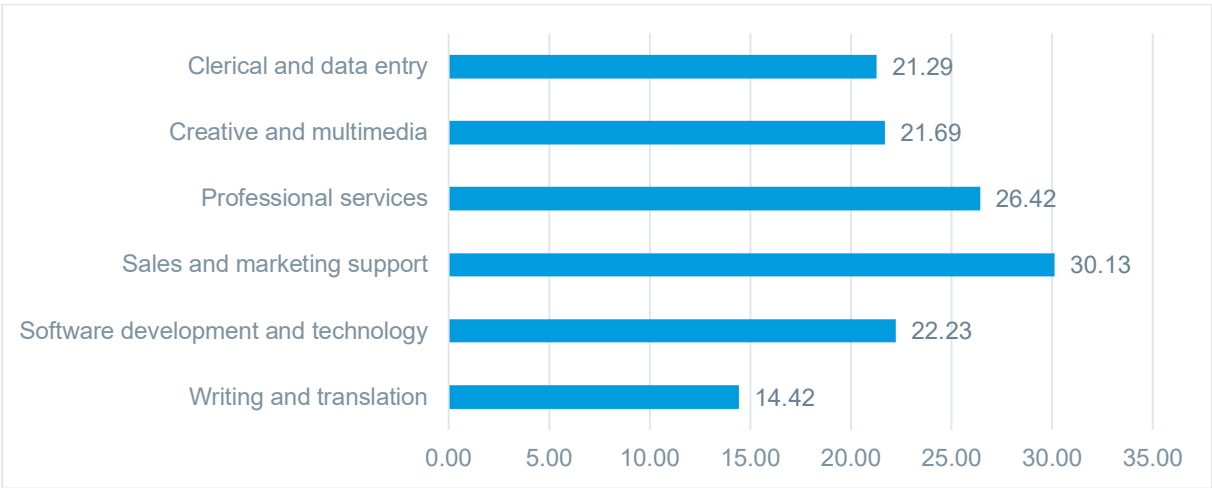
secondary source of income or even refugees and migrants seeking to secure their livelihood with online income. Although it is common for Lebanese workers to take freelance assignments as a way to supplement their income while keeping their official jobs, online work is increasingly becoming a full-time job for many individuals who build their careers around online freelancing.⁴⁵

Working conditions

Working conditions of online workers on and off digital platforms are mixed. Although platforms can provide high incomes, only a small number of workers are successful on digital platforms. Workers also operate under highly informal and insecure conditions caused by a poor regulatory environment, unstable infrastructure and high internet fees.

Although the hourly rates of Lebanese platform workers are among the highest in the SEMED region, there is a significant disparity in hourly rates, which varies depending on the occupations. The highest hourly wages were demanded in sales and marketing support (USD 30.13) and professional services (USD 26.42), while the lowest was observed in writing and translation standing at only USD 14.42. Furthermore, there is a gender difference in hourly pay, with men demanding higher wages than women. Lebanese men requested USD 22.42 per hour, while women requested USD 20.62. The gender pay gap appears to be related to occupational distribution, as women represent the majority in writing and translation, which is the lowest-paid occupation.

Figure 4. Hourly rates of active online platform workers by occupation



Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Despite the significant differences in hourly rates on digital platforms, they are still significantly higher than the national average hourly wage. According to Numbeo,⁴⁶ the average net hourly pay in Lebanon in March 2023 was USD 3.17. This amount is almost seven times lower than the average hourly wage on online labour platforms (USD 21.67). However, it is important to note that these figures are not directly comparable, as requested hourly rates can differ from what workers ultimately get. Platform earnings are irregular and may include a substantial amount of unpaid work and only a minority of workers get any jobs on the platforms. Nevertheless, this data indicates that online platform work may present an important income-generating opportunity for Lebanese workers.

⁴⁵ Interview with Mr Farid Khalil, 12.06.2023.

⁴⁶ Numbeo.com. Rankings by Country of Average Monthly Net Salary. https://www.numbeo.com/cost-of-living/country_price_rankings?itemId=105

On-location platform work

The last decade saw a proliferation of on-location platforms in Lebanon. The beginning of on-location platforms in Lebanon can be dated back to 2014 when the ride-hailing company Uber and the delivery company Zomato entered the market, and these were soon followed by other platforms. However, this type of work became most prominent in public discourse during the COVID-19 lockdowns. The media mostly praised the contribution of platform delivery in providing solutions to ordinary citizens and businesses,⁴⁷ but also for providing employment in the crisis-ridden labour market. However, the regulation of platform work and working conditions did not receive much attention.

Prevalence of on-location platform work

There are no official statistics on the prevalence of on-location platform work in Lebanon. The lack of this data can be explained by the fact that on-location platform workers operate under the status of undifferentiated independent contractors and the local platforms are not willing to disclose their real number of workers.

There is a large number of local and international platforms operating in Lebanon. The most popular digital labour platforms for on-location platform work active in Lebanon can be divided into following groups:

1. Ride-hailing platforms:

- Bolt: A transportation platform providing ride-hailing, micromobility, and food delivery services, with the help of more than 1.5 million registered drivers. Headquartered in Tallinn, Estonia, it operates in more than 200 cities across 40 countries in Europe, Africa, Western Asia, and Latin America.⁴⁸ In Lebanon, Bolt operates only in Beirut and it differentiates itself from many ride-hailing companies in using micromobility, which means the use of motorcycles as taxis.
- Uber: The American ride-sharing company that operates in Lebanon. It provides mobility services in the cities as well as rides from and to Beirut airport.

2. On-delivery platforms:

- Toters:⁴⁹ Founded by two Lebanese tech entrepreneurs, Tamim Khalfa, Nael Halwani. It connects merchants with customers and can deliver items such as food, groceries, and electronics.
- Dale3 Jo3ak:⁵⁰ The meaning of the name of the company in Arabic is 'Spoil your hunger'. This is an online food ordering service that helps customers find restaurants in their area. The company operates in the Bekaa region.
- Gozilla: a Lebanese initiative that specialises in delivering food and drinks from various restaurants and retailers.
- Instashop:⁵¹ an on-delivery platform which belongs to the Swedish company Delivery Hero. It specialises in delivering groceries to customers' doorsteps.

⁴⁷ L'Orient Today (2021). The deliveryman, the strong link in a confined Lebanese economy (*Le livreur, maillon fort d'une économie libanaise confinée*). <https://www.lorientlejour.com/article/1248513/le-livreur-maillon-fort-dune-economie-confinee.html>

⁴⁸ Bolt.eu. Bolt in Beirut. <https://bolt.eu/en/cities/beirut/>

⁴⁹ Totersapp. <https://www.totersapp.com/>

⁵⁰ Dale3 Jo3ak. <https://dale3jo3ak.com/>

⁵¹ Deliveryhero.com. InstaShop. <https://www.deliveryhero.com/brands/instashop/>

- Markit:⁵² This is a Lebanese company which delivers items from various retailers to customers. It uses its mobile application for the purpose. It promises to deliver a range of products such as food, drinks, and groceries. It boasts 100,000 users and operates in six cities.
3. Care services platform:
- Jaleesa:⁵³ Founded in 2016 Jaleesa is Beirut's first on-demand, online childcare service that connects parents with experienced child carers.

Despite a high number of on-location platforms in Lebanon, many of them have either gone out of business or terminated their operations in Lebanon. For example, a ride-hailing and delivery service platform Careem stopped working in the country due to the unfavourable economic situation in 2022 and a drop in revenue. Another international platform which left the country is Indian delivery platform Zomato.⁵⁴ Furthermore, due to the pandemic, the volume of work on online platforms dropped significantly. For example, most of the platform drivers (around 80%) worked temporarily in this period (for a few days to a few months) or suspended their work, compared with just 41% of traditional taxi drivers.⁵⁵ It is unclear how these figures changed after the pandemic.

Attractiveness of on-location platform work

People decide to work on on-location platforms mainly due to a lack of alternative employment opportunities. According to the ILO survey, around 40% of the workers on-delivery and ride-hailing platforms in Lebanon do these jobs because they cannot find other employment.^{56 57}

Earnings is one of the most important factors attracting workers to on-location platforms. As the ILO survey showed⁵⁸ earnings of platform-based drivers are higher than those of traditional taxi drivers. The survey explains this difference as being due to bonuses and incentives from the platform (for working during rush hour or meeting or exceeding a certain volume of rides), and tips from customers. In addition, these taxi platforms are more popular among customers than the traditional taxi.

The attractiveness of on-location platform work is also influenced by the low entry barriers to these jobs, which is particularly important for the unemployed, young people and immigrants. Primarily, on-location platform work does not usually require high skills. Most of these jobs require basic communication and digital skills, as well as the ability to drive. However, workers are still usually required to have their own smartphone and a vehicle. In the case of ride-hailing platforms, drivers are also obliged to obtain taxi licences. Ride-hailing platforms in Lebanon mostly rely on people who use their own means of transport (78% of respondents of platform-based drivers owned the car which they operated).⁵⁹

Generally workers find on-location platform jobs through social media and word of mouth. However, the ride-hailing platforms also invested a lot in recruitment campaigns using billboards and online

⁵² Markit. <https://markitworld.com/>

⁵³ Jaleesa. <https://www.linkedin.com/company/jaleesa/about/>

⁵⁴ Vibelb.com (2022). Gozilla Food Delivery Business, Great Zomato Alternative For Lebanon. <https://vibelb.com/gozilla-food-delivery-zomato-alternative-for-lebanon/>

⁵⁵ ILO (2022). Ride-hailing versus traditional taxi services: The experiences of taxi drivers in Lebanon. <https://www.ilo.org/static/english/intserv/working-papers/wp085/index.html>

⁵⁶ ILO (2021). World Employment and Social Outlook: The role of digital labour platforms in transforming the world of work. https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

⁵⁷ According to the ILO survey findings, in 2022, about 29.6% of the unemployed had been seeking employment for two years or more and another 19.2% had been seeking employment for between one and two years. Thus, in total, about 48.8% of the unemployed were in long-term unemployment in 2022. ILO (2022). Lebanon follow-up Labour Force Survey. https://www.ilo.org/beirut/publications/WCMS_848353/lang--en/index.htm

⁵⁸ ILO (2022). Ride-hailing versus traditional taxi services: The experiences of taxi drivers in Lebanon. <https://www.ilo.org/static/english/intserv/working-papers/wp085/index.html>

⁵⁹ ILO (2022). Ride-hailing versus traditional taxi services: The experiences of taxi drivers in Lebanon. <https://www.ilo.org/static/english/intserv/working-papers/wp085/index.html>

advertisements. They also used ‘brand ambassadors,’ a group of university students who talk to potential drivers while in traffic, explaining the benefits of working for a ride-hailing company.⁶⁰

On-location platform work occupations and worker profiles

On-location platform workers in Lebanon are mostly young men with mixed levels of education, including a large number of refugees from neighbouring Syria.

Workers on on-location platforms in Lebanon in general have lower education levels than online platform workers. According to the ILO report (2021), 25% of workers in the ride-hailing sector have completed only primary school, 55% have completed secondary school, 15% higher secondary school, and only 5% of the workers have university degrees. As regards the delivery sector, 20% of the workers have completed primary school, 40% have completed secondary school, an additional 30% have high secondary school education, and 5% of workers have university degrees.⁶¹ Considering that only 5% of both ride-hailing and delivery workers hold a bachelor’s degree, it can be assumed that most of the workers in the sector are not highly skilled.

In the case of gender, the vast majority of on-location platform workers are men. Women represent only about 2% of the workers in the ride-hailing sector, while no women were identified in the delivery sector.⁶²

Most of the on-location platform workers in Lebanon are young. In both ride-hailing and delivery sectors, workers tend to be younger than those engaged in traditional services.⁶³

Working conditions

In general, working conditions on on-location platforms in Lebanon are poor due to unfavourable regulations and the lack of protections, long working hours and high costs. However, incomes on on-location platforms are often higher than for similar jobs on the local labour market.

On-location platforms in Lebanon are usually classified as independent contractors without labour contracts. In contrast, the office and management staff have permanent jobs. Being classified as an independent contractor automatically results in a lack of labour protections that workers in regular employment enjoy.

On-location platform workers in Lebanon experience a high degree of insecurity in their job. According to the ILO survey, 42% of app-based drivers and 23% of app-based couriers stated that they experienced or witnessed discrimination or harassment.⁶⁴

Most of the on-location platform workers work long hours. The weekly average for ride-hailing platforms is 69 hours and for delivery platforms 63 hours. Although average working hours do not differ

⁶⁰ ILO (2022). Ride-hailing versus traditional taxi services: The experiences of taxi drivers in Lebanon. <https://www.ilo.org/static/english/intserv/working-papers/wp085/index.html>

⁶¹ ILO (2021). World Employment and Social Outlook: The role of digital labour platforms in transforming the world of work. https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

⁶² ILO (2021). World Employment and Social Outlook: The role of digital labour platforms in transforming the world of work. https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

⁶³ ILO (2021). World Employment and Social Outlook: The role of digital labour platforms in transforming the world of work. https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

⁶⁴ ILO (2021). World Employment and Social Outlook: The role of digital labour platforms in transforming the world of work. https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

significantly from the working hours of workers outside of platforms in these sectors, these hours can certainly be considered detrimental to workers' health.⁶⁵

The main reason why workers still work on on-location platforms despite poor working conditions is that the income is generally higher than in the respective sectors. A statistical analysis conducted for ILO research concluded that platform drivers in Lebanon earn approximately 80% more than non-platform drivers.⁶⁶ As for the delivery sector, couriers in Lebanon earn about 25% more than their sectoral counterparts.⁶⁷ The hourly earnings in the ride-hailing and delivery sectors vary from USD 3.7 to 8.2.⁶⁸

Despite high earnings, platform workers incur many costs. More than 90% of app-based delivery workers noted that they were either given or expected to buy the uniforms and bags necessary for working with the platforms, in addition to the high mandatory commission they regularly pay to the platforms. Moreover, workers have to cover fuel costs (which consume about 24% of the income of platform-based drivers), insurance⁶⁹ (about 460,000 Lebanese pounds per year compared to 260,000 Lebanese pounds per year for traditional drivers), repair and maintenance fees, fines and parking fees, mobile phone charges and car wash costs.⁷⁰

⁶⁵ ILO (2021). World Employment and Social Outlook: The role of digital labour platforms in transforming the world of work. https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

⁶⁶ ILO (2022). Ride-hailing versus traditional taxi services: The experiences of taxi drivers in Lebanon. <https://www.ilo.org/static/english/intserv/working-papers/wp085/index.html>

⁶⁷ ILO (2021). World Employment and Social Outlook: The role of digital labour platforms in transforming the world of work. https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

⁶⁸ ILO (2022). Ride-hailing versus traditional taxi services: The experiences of taxi drivers in Lebanon. <https://www.ilo.org/static/english/intserv/working-papers/wp085/index.html>

⁶⁹ The issue of social protection for platform-based drivers in Lebanon is complex. While taxi licence owners benefit from social protection provided by the National Social Security Fund (NSSF) the existence of a parallel market for licences undermines this system. Many drivers who rent licences may not be able to pay additional amounts demanded by the license owner, which will result in lack of coverage. Platform-based drivers who are more likely to rent licences, and tend to be younger, may be less inclined to pay for social security.

⁷⁰ ILO (2021). World Employment and Social Outlook: The role of digital labour platforms in transforming the world of work. https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

Current regulation, policies and strategic approaches

Labour market, employment and skills development

Labour market regulations in Lebanon don't apply directly to platform work, with workers mostly working as independent contractors. Although the status of online and platform workers in Lebanon is unresolved, there are important upskilling initiatives that could further facilitate platform work in the country.

Employment in the Lebanese private sector is regulated by the Labour Code.⁷¹ This law secures the rights of employees and employers by outlining their entitlements and obligations in the workspace. However, the law does not cover all types of workers and does not mention independent workers or independent contractors.⁷² Instead, independent workers or contractors are governed by the Code of Obligations and Contracts, which contains a general principle of good faith and fair dealing, which broadly applies to the contracting parties to any type of contract.⁷³ Any other regulations affecting the platform work sector are usually limited to areas which overlap with other sectors. For example, the requirement for platform-based drivers to have distinctive number plates is the result of regulations in the taxi sector rather than a sector specifically designed for ride-hailing.

Before starting to work, those on-location platform workers who have contracts agree to a consultancy agreement ('service contract') that defines the relationship between the platform and the worker. This relationship, which is the term of conditions agreed with the employers contains elements of subordination.⁷⁴ However, this subordinate relationship is still not legally recognised as employment.

Even when platform work is not informal, contracts are rarely available to on-location platform workers. According to the ILO survey in Lebanon,⁷⁵ most platform drivers had not seen a copy of their contract. About 19% of platform-based drivers employed by a taxi company reported having seen a copy of their contract or the terms and conditions related to their job, and a majority (67%) considered that seeing their contract was unimportant.

Even though, as it was aptly stated in the ILO report 'activities in the platform economy in Lebanon take place in a relative legal vacuum' and there are no specific laws addressing platform work, there is a hope that more initiatives from policymakers may bring structure to this field. According to the President of the Lebanese Association of IT Professionals,⁷⁶ the Parliament in Lebanon and the Ministry of Labour are working on a new labour law modification that would expand some rights also to those working in atypical work arrangements, such as platform workers.

As for the level of skills development, there are three noteworthy initiatives in the country relevant to platform workers:

- The first upskilling project, Coursera Partnership is organised by ESCWA (Economic and Social Commission for Western Asia), the Lebanese Ministry of Labour, and the e-Learning platform

⁷¹ ILO (2010). Argus de la législation libanaise. Labour Code of 23 September 1946 as amended. <https://www.ilo.org/dyn/travail/docs/710/Labour%20Code%20of%2023%20September%201946%20as%20amended.Publication%202010.pdf>

⁷² See Art 7 of the Labour Code.

⁷³ Code of Contracts and Obligations (1932).

⁷⁴ The Policy Initiative (2022). Lebanon's "Missing Middle": Online Delivery Workers Under Precarious Conditions. <https://api.thepolicyinitiative.org/content/uploads/files/780~Lebanon%E2%80%99s-Gig-Economy-Report.pdf>

⁷⁵ ILO (2022). Ride-hailing versus traditional taxi services: The experiences of taxi drivers in Lebanon. <https://www.ilo.org/static/english/intserv/working-papers/wp085/index.html>

⁷⁶ Interview on 11 June 2023.

Coursera.⁷⁷ The project aims at reskilling unemployed people and empowering citizens through free online training. Though the project is not directly related to online work, many of the 4,900 courses were targeting digital skills such as coding, data analysis, and graphic design.

- The second initiative is the National Digital Academy, an e-Learning portal open to civil servants and ordinary citizens to provide training and orientation in digital skills.⁷⁸ For the further development of the portal, the ministry received the promise of many universities to make content available on a voluntary basis. This initiative is also targeting unemployed people and citizens with inadequate digital skills.
- The third initiative is called Skilling Up Lebanon which is a partnership between the local firm Beirut Digital District and the World Bank. The programme promises to equip 9,500 women and men with the digital skills that will potentially offer them employment opportunities in the local, regional, and global job market; it is also hoped that the programme will attract investors to the country.⁷⁹

All these upskilling initiatives should have a positive impact on the promotion of digital skills and new forms of work. However, there remains the issue of the digital divide in terms of knowledge and skills between different sectors. The first divide is between the public and the private educational providers, with private ones being more advanced. The other divide is between SMEs (Small and Medium Enterprises) and large companies, with SMEs lagging behind in terms of employee digital skills.⁸⁰

Digitalisation

To counter insufficient digitalisation of the Lebanese economy, government launched several important initiatives to further the digital transformation of the country.

In 2022, Lebanon updated its National Digital Transformation Strategy. Its vision is summarised as follows:

‘To improve the standard of living of our people and the economic and legal environment for companies operating on our lands by transforming Lebanon into an advanced country in the field of digital services, providing an open and transparent government and providing digital services with the main focus on the citizen, to enable public sector employees to serve citizens, residents, foreign visitors, entrepreneurs and society in its entirety, by 2030.’⁸¹

This initiative thus aims to improve digitalisation in the private and public sectors and increase the engagement of citizens with digital technologies.⁸² The National Digital Transformation Strategy was translated into 80 projects for which financial resources have been provisionally allocated through World Bank grants totalling between USD 60 million and USD 100 million.

In addition, the National Cybersecurity Strategy⁸³ was adopted to protect government assets, markets, commercial sectors, and citizens from cyber threats and attacks, such as piracy and electronic fraud,

⁷⁷ UNESCWA. [Coursera partnership. Reskilling Lebanon’s youth to enhance their employability.](https://www.unescwa.org/coursera) <https://www.unescwa.org/coursera>

⁷⁸ Office of the Ministry of State for Administration Reform (2022). Lebanon Digital Transformation. National Strategy. https://omsar.gov.lb/Assets/DT_EN.pdf

⁷⁹ World Bank (2022). Beirut Digital District and the World Bank launch Skilling Up Lebanon. <https://www.worldbank.org/en/news/press-release/2022/04/07/beirut-digital-district-and-the-world-bank-launch-skilling-up-lebanon>

⁸⁰ Karim Mehrej & Maysa Baroud. The Digital Economy as an Alternative to in Lebanon: Focus on Micro and Small, and Medium Enterprises. 2020. https://www.aub.edu.lb/ifi/Documents/publications/policy_briefs/2020-20/20210201_The_Digital_Economy_as_an_Alternative_in_Lebanon.pdf

⁸¹ Office of the Ministry of State for Administration Reform (2022). Lebanon Digital Transformation. National Strategy. https://omsar.gov.lb/Assets/DT_EN.pdf

⁸² Office of the Ministry of State for Administration Reform (2022). Lebanon Digital Transformation. National Strategy. https://omsar.gov.lb/Assets/DT_EN.pdf

⁸³ Presidency of the Council of Ministers (2019). Lebanon National Cyber Security Strategy. <http://www.pcm.gov.lb/arabic/subpg.aspx?pageid=13537>

which are on the rise because of the increase in electronic transactions and data. This regulation is crucial for further digital transformation of the Lebanese public and private sector.

Policy implications

Challenges and opportunities of the current situation

New forms of work, online and on-location platform work, emerged in the midst of the economic and political crisis in Lebanon. On the one hand, new forms of work could possibly alleviate some of the detrimental effects of the crisis, while on the other, the crisis is preventing full realisation of the platform economy.

So far, new forms of work have been unable to fulfil the promise of decent jobs for Lebanese people, particularly for youth and refugees. Online and platform workers are facing a number of issues such as poor digital infrastructure, limited international payment systems, troublesome legal regulations and lack of social protections.

However, new forms of work may still play a role in securing decent jobs, integrating vulnerable social groups in the labour market and preventing large-scale emigration. Notable opportunities in this regard include the updated national strategic documents aimed at improving digitalisation in the private and public sectors and increasing the engagement of citizens with digital technologies, as well as the upskilling and reskilling initiatives aimed at providing training and orientation in digital skills, targeting the unemployed in particular.

Gaps in the existing strategic and policy approaches

In Lebanon, there is a lack of progress in regulatory aspects for the new forms of work. The Labour Code does not apply to independent contractors, workers are left without any protection and are semi-legally employed. Moreover, the prevalence of informality in on-location and online platform work further highlights the need for regulatory reforms and legal frameworks to ensure adequate protection and benefits for all workers, regardless of their employment status.

Implications / possible measures for regulation

There are several key policy pointers that can help harness the full potential of online and platform work in Lebanon:

- It is crucial for Lebanon to improve its underdeveloped ICT infrastructure. The government should further invest in improving the quality of internet infrastructure, and increase internet coverage and speed. Although these investments are costly, they have the potential to pay off in the future.
- In the case of frequent power outages, the citizens who possess generators have easier and more regular access to the internet. To overcome this challenge, public authorities can foster the creation of co-working spaces which are equipped with the necessary infrastructure to guarantee the availability of electricity and internet connection. Such centres already exist in Beirut⁸⁴ and the public authorities need to contribute to the spread of such hubs and make them accessible at a reasonable usage fee.
- Policy initiatives should aim to increase access to international payment systems, which crucially affect online and platform workers in Lebanon. These initiatives would not only benefit freelancers but could have broader positive effects on the local economy.

⁸⁴ Beirut.com. A web site guide to coworking space in Beirut: <https://www.beirut.com/en/63551/11-co-working-spots-to-get-productive-in-lebanon>

- Public Employment should be modernised and adapted to the nature and requirements of the new forms of work. The aim is to bridge the gap between the labour market and skills provision, to equip workers with the skills in demand, to promote entrepreneurship and innovation, as well as career guidance.
- The authorities should introduce regulations governing the employment status of online platform workers. This would not only safeguard the basic rights of workers, but also help suppress widespread tax evasion.
- Lebanon experiences an extremely high level of female inactivity in the labour market. Platform work has the potential to empower women by offering them flexible employment opportunities which can be adjusted to their domestic responsibilities. This is particularly significant in the context of Lebanese society, which is recognised as being one of the countries with most gender equality in the SEMED region. The Lebanese government should promote new forms of work among women and provide them with the skills needed for these jobs.
- Online and on-location platform work could potentially help alleviate issues associated with large migratory flows in Lebanon. While online work opportunities may be a way to prevent brain drain and keep young people in the country, platform work might also provide employment opportunities for those most vulnerable, particularly refugees. For this, the facilitation of different promotion and upskilling programmes is necessary.
- To alleviate youth unemployment, the government could encourage young people to participate in online and platform work. To encourage online freelancing, special efforts should be made to provide opportunities for gaining experience and developing skills before entering online markets.
- To tackle the low overall level of digital skills among the population, policymakers responsible for education should review and update educational curricula to incorporate digital skills and entrepreneurial competencies from an early age. Furthermore, it is important to develop vocational training programmes focused on equipping people with the skills needed for the new digital economy.
- Finally, large diaspora networks could be an asset in developing the platform economy. Lebanese living abroad could facilitate online work in their country not only by hiring Lebanese freelancers, but also as investors in local Lebanese platform businesses. This potential could be realised with targeted government programmes for the diaspora.

Summary

For many years, the Lebanese economy has endured the drawbacks of successive political crises which have paralysed its institutions and left the economy on the brink of collapse. Extremely high inflation, a growing informal economy and widespread poverty have taken a toll on the living standards of the Lebanese people. The country is plagued both by high emigration and brain drain, but also by large-scale immigration from neighbouring Syria. Consequently, the labour market is suffering from high rates of inactivity and unemployment, particularly among women, youth and refugees. Not only do young people not have many job opportunities on the local market, but they also suffer from an underdeveloped and rigid educational system that does not prepare them adequately for the labour market. While a large percentage of Lebanese are using the internet, internet services are expensive, and the quality of the internet infrastructure is poor. In addition, internet connection is heavily impeded by frequent power outages in the country.

There has been a significant expansion of online work in Lebanon, both on and off digital platforms. Although Lebanon is the second largest supplier of platform work in the SEMED region, the number of active workers has decreased in recent years. Online work in Lebanon is popular in Lebanon due to the possibility of securing jobs in a job-scarce environment and having a higher income than would be available on the local labour market. Nevertheless, freelancers are also deterred by poor regulations and problems with internet infrastructure. Most of the freelancers in Lebanon work in creative and IT occupations and most of the freelancers are male, with the exception of the writing and translation sector. Although hourly rates on digital platforms can be high, they are very diverse across occupations and between genders, with male dominated fields being higher paid. Furthermore, only a small number of freelancers manage to secure jobs online, while others are either unsuccessfully attempting to get jobs or work only occasionally. Finally, overall work conditions on online platforms are poor due to freelance workers not having a clear legal status. The poor conditions are further exacerbated by the inadequate internet infrastructure and limited access to international payment systems.

On-location platform work in Lebanon has proliferated in the past decade, beginning with the arrival of international platforms such as Uber in 2014. The COVID-19 pandemic and economic crisis have further exacerbated the growth of on-location platforms. However, the on-location platform economy has also suffered some drawbacks due to the economic crisis, as several platforms left the country due to the weakened economic conditions. Most of the workers choose to work on on-location platforms due to the lack of better opportunities in the local labour market. Furthermore, on-location platform jobs are attractive because they pay more than equivalent jobs in the traditional market and because the entry barriers are low. However, workers still need to have basic digital skills, a driving licence and a vehicle. Most of the workers are male, young and have low or medium education levels. In the case of work conditions, platform work is mainly unregulated with workers operating as independent contractors not entitled to any of the social protections guaranteed for regular employees. Working hours are long and on-location platform work is often dangerous. However, this work still offers higher remuneration than jobs on the local labour market, even after costs such as fuel and platform fees.

Lebanon lags behind when it comes to regulations related to the new forms of work. As the labour code does not apply to independent contractors, workers are left without any protections and in semi-legal employment arrangements. Thus, work still needs to be done to regulate the status of platform workers. In contrast to the lack of progress in regulatory aspects, the Lebanese government is working on improving the digital skills of workers. There are several important national initiatives aimed at improving the skills essential for online and platform work. In the case of broader digital transformation, the Lebanese government has also launched important initiatives aimed at the digitalisation of both the public and private sectors and increasing the usage of digital technologies among citizens.

The potential of online work in Lebanon for securing decent jobs, integrating vulnerable groups in the labour market and slowing down emigration is significant. However, it also faces serious challenges such as poor internet infrastructure, limited access to international payment systems and lack of legal regulations governing new forms of work. To unlock the potential of new forms of work and overcome

challenges, the Lebanese government should work on improving the country's digital infrastructure, regulate the status of online and platform workers, encourage platform work among vulnerable populations and facilitate the development of digital skills in the population.

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List of interviewees

Name	Organisation	Title	Date of the interview
Sélim Mekkissi	Faculty of Economics and Business Administration. Lebanon	Dean	31/05/2023
Daniel Kofdrali	Ideatolife	Chief Strategy Officer Past CEO Onlivery Lebanon	24/07/2023
Rabih Baalabaki	Lebanese Association for IT Professionals	President	11/06/2023
Farid Khalil	Independent	Digital Transformation Expert	12/06/2023
Dany Wazen	UNDP	Digital Transformation Expert and ICT specialist	08/06/2023