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Strategic plan of the Hairdressing & Beauty Services Sector in Jordan

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Chapter 1: Sector Overview

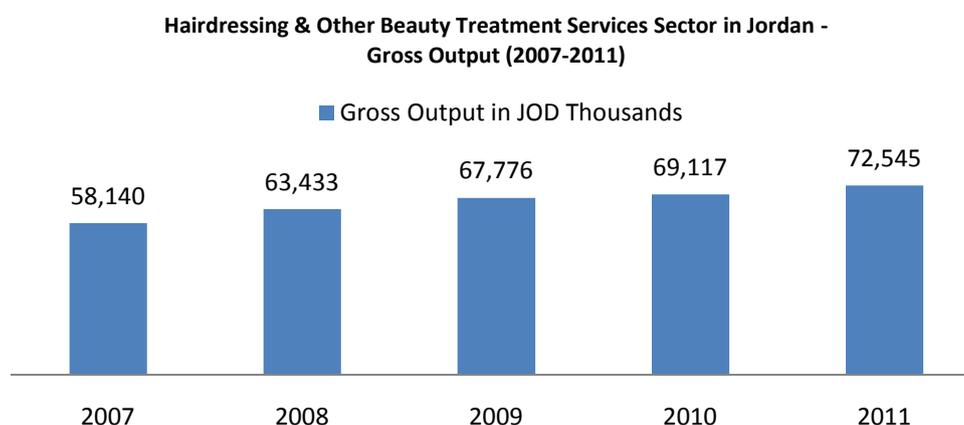
1.1. Profile of the Hairdressing & Beauty Sector in Jordan

Size and Shape of the Sector

The Hairdressing & Beauty sector in Jordan is characterised by being made up of small businesses, most employing (1-2) people. Some larger beauty salons employ more workers but those are considered a minority.

The hairdressing and beauty services sector corresponds to the International Standard Industrial Classification of all economic activities (ISIC) code – Services Survey(9602 – Hairdressing & Other Beauty Treatment). The following figure illustrates the gross production output of the hairdressing and other beauty treatment services sector in Jordan during (2007-2011) according to the latest statistical data obtained from the Department of Statistics:

Figure 1: Hairdressing and Other Beauty Services Sector in Jordan - Gross Output in JOD Thousands (2007-2011)



Source: Department of Statistics – Services Survey

Figure 2 shows that the gross output of the Hairdressing & Other Beauty Treatment services sector in Jordan increased from JOD 58.14 million in 2007 to JOD 72.545 million in 2011 reflecting a growth rate of 24.8% over the (2007-2011) period. The gross output of the Hairdressing & Other Beauty Treatment services sector has been growing during the (2007-2011) period at an average compound annual growth rate (CAGR) of 5.7%¹.

The sector has a good value added compared to its gross output (64%) compared to the overall services sectors (60%). The sector contribution to the gross value added of the services is quite good at (2%) – close and comparable to legal services, real estate services, dental services and travel agency activities².

Distribution of Production and Services

There are no official statistical data available at the Department of Statistics or any other official data source indicating on the distribution of production – or gross output – of each of the sub-sector

¹ Source: Department of Statistics, Services Survey

² Source: Department of Statistics, Services Survey

activities of Hairdressing & Beauty in Jordan. However, the sector can be divided into four sub-sectors as shown in the following table:

Table 1: Distribution of Production and Services

Sub-Sectors	Key Services
Women hairdressing salons	Key services include hairdressing services including cutting, styling, colouring, straightening and waving hair with chemical solutions and hairdressing tools and equipment, as well as provide clients with hair treatment. Some women salons offer more services than others, for example, many salons offer makeup services as well as facials and body waxing, some salons also offer manicure and pedicure services, as well as eyebrow plucking. Some salons offer bride services, while other salons are limited to purely hairdressing services.
Men Barbershops	Key services include hairdressing services for male customers of all ages. Such services include hair cutting, styling and colouring. Services extend to cover beard and goatee trimming as well as and facial hair removal. Some barbershops offer bridegroom services as well as facial skin cleansing and treatment. A small number of barbershops offer nail care services.
Skin Care Centres	performing beauty and skin care services such as performing skin treatments on clients, cleansing skin, removing makeup, performing consultation to determine the most suitable beauty/skin care procedure, exfoliating dead skin, applying chemical peels, removing skin tags and moles, guiding clients on makeup application techniques, using techniques to evaluate extent of sun damage or wrinkles, removing blackheads and whiteheads, applying face masks, applying preoperative and postoperative skin care and more.
Kids Hair Salons	There is a relatively small number of kids hair salons particularly located in the western areas of Amman. These salons offer hair cutting and styling services to kids.

Sector Structure and Categories of Sector Enterprises

The hairdressing and beauty services sector in Jordan is dominated by micro-level and small businesses in the form of salons, barbershops and beauty and skin care centres. The sector is fragmented as it does not have a regulating umbrella and lacks proper grouping and presentation, except for the General Syndicate for Beauty Parlour Owners which comprises women salons and beauty centres. There is also the General Syndicate for Barbers Salon Owners (representing men barbershops), but that syndicate is currently inactive because of a number of administrative and legal issues.

The syndicate’s role in representing, organising and regulating the sector has been weakened since the introduction of the vocational training by-laws in 1999, when the syndicate became no longer responsible for validating quality measures and building the capacity of human resources in the sector. The lack of effective representation of the sector has resulted in sector enterprises lacking voice and leverage in terms of policy reform and sector-related regulatory and organization issues. The regression of the syndicate’s role has also impacted negatively on sector enterprises in terms of professional development.

Sector enterprises are mostly registered at the Commercial Registrar of the Ministry of Industry and Trade as sole-proprietorship establishments, or as partnership or limited liability companies at the Company Control Department at the Ministry of Industry and Trade.

The process of licensing women salons is lengthy and overcomplicated, as licensing procedures require applicants to go through a lengthy and exhausting process that requires obtaining clearances from the Ministry of Interior and its various departments. Such complicated procedures are a cause of concern to investor contemplating investing in the sector.

Existing requirements for licensing and registration do not sufficiently protect customers and there is a need for increased quality control of the qualifications (based on validated occupational standards) and experience required for establishing a business in beauty and hairdressing

As stated earlier in this report, the vast majority of sector enterprises are very small in terms of the number of workers they employ, and the vast majority of sector enterprises are located primarily in Amman.

Employment Patterns and Nature of Functional/Occupational Roles in the Sector

The main occupational roles in the sector can be summarized as follows:

Table 2: Main Occupational Roles in the Beauty & Hairdressing Sector in Jordan

Sub-Sector Enterprises	Key/Mainstream Occupational Roles	Other Occupational Roles at Some Sector Enterprises
Women Hairdressing Salons	<ul style="list-style-type: none"> • Women Hairdresser • Hairdresser Assistant 	<ul style="list-style-type: none"> • Makeup/Facial Specialist • Manicure & Pedicure Specialist • Waxing (for body hair removal).
Men Barbershops	<ul style="list-style-type: none"> • Barber (Men Hairdresser) • Barber Assistant 	
Beauty & Skin Care Centres	<ul style="list-style-type: none"> • Beauty Therapist/Skin Care Specialist • Beauty Therapist/Skin Care Specialist Assistant. 	<ul style="list-style-type: none"> • Foot Care Specialist • Masseuse
Kids Hair Salons	<ul style="list-style-type: none"> • Kids Barber 	

Workers in the sector are usually employed by sector enterprises on full-time basis, except during high demand seasons where some salons hire extra workers on part-time basis. In addition, some salons hire some workers of scarce skills/specialisations on part-time or ad-hoc basis (i.e. manicurists & pedicurists).

Sector enterprises are obliged by law to enrol their employees in social security schemes and some salons offer health insurance. However, health insurance is not available for workers who are employed at the small salons and shops which are the majority in the sector.

Entrants to occupations in the sector usually receive vocational education and training and get hired by salons/shops as assistants. At the inception stages of their careers they work under the direct

supervision and mentorship of senior workers until they become skilled /experienced sufficiently to handle clients.

Some barbershops hire junior assistants who help barbers in cleaning the shop, sterilizing equipment as well as providing shampoo services to clients before and/or after the hair cutting service.

Major Sector Stakeholders

The following is a list of the major sector stakeholders:

- Ministry of Industry and Trade.
- Ministry of Labour.
- Ministry of Education.
- Ministry of Health.
- Ministry of Interior.
- Zarqa Chamber of Commerce.
- Irbid Chamber of Commerce.
- The General Syndicate for Beauty Parlour Owners
- Employment-Technical & Vocational Education & Training Fund (E-TVET Fund)
- Vocational Training Corporation.
- Jordan Enterprise Development Corporation (JEDCO).
- Jordan Customs Department.
- Sales and Income Tax Department.
- Greater Amman Municipality.

1.2. Factors Impacting on Development of the Sector

PESTEL Trends (Political, Economic, Social, Technological, Environmental and Legal)

Key Political Factors

- There seems to be a monopoly over the approval of vocational training curricula by the public sector providers (VTC and Al Balqa Applied University). This has business implications for private sector training providers and limits the diversity of programmes.
- The role of the syndicate has been restrained in recent years amid the introduction of vocational training by-laws in 1999 and the sector lacks power and control ever since as a result.
- The sector has been given little attention by the government and donors compared to other productive sectors of the Jordanian economy.

Key Economic Factors

- Inflation rate has increased in the past several years and one of the main causes is the removal of fuel subsidies. The Customer Price Index grew by an average 4.8% in 2012 according to the Central Bank of Jordan. This can influence income levels and purchasing power, which may have contributed to the decrease in per capita expenditure on personal care and beauty services from 3.2% of per capita expenditure of the Amman-based

consumers in 2003 to 2.8% in 2006 onwards. It is worth mentioning that the prices of cosmetics and other beauty products imported by salons and beauty centres in Jordan have also risen as a result.

Key Socio-Cultural Factors

- Jordan's population reached an estimated 6.5 million at the end of 2011 according to the Department of Statistics estimates. There is an obvious correlation between population size and the demand volume for sector products and services. This has resulted in the sector's increased production output and overall revenues despite the decrease in per capita expenditure on personal care and beauty services by the Amman-based consumers.
- The general perception and attitudes towards male workers specializing and working in women hairdressing, beauty and skin care professions is changing positively and the status of the profession is becoming higher and more socially accepted.
- However, it should be stated that there are some key occupations in the sector that are in high market demand that are still being looked at as socially inappropriate jobs by Jordanians, most importantly the manicure and pedicure specialization.

Key Technological Factors

- Beauty is becoming more 'technical' worldwide. Innovations in electrolysis as well as beauty and skin care is advancing globally and some high-end beauty centres in Jordan are deploying technological advancements and new skin care techniques, contributing to raising service quality in the sector.

Key Legal Factors

- There are negative implications of laws and the consistent application of regulations covering tenancy, sales tax and social security. There are also concerns by some salons about the consistent applications of such laws and applications among all sector enterprises.
- The lengthy licensing and registration procedures are affecting the investment environment in the sector and hindering investors from investing in the sector.
- There are negative effects on service quality in the sector as a result of allowing new entrants of below-par qualifications and experience into business as existing licensing and registration regulations do not stress on qualifications and experience based on occupational standards.

Consumer Trends

Key customer trends in the women hairdressing salons sub-sector

The following table shows the key customer segments within this sub-sector and the key services demanded as well as key preferences and behavioural patterns of each segment:

Table 3: Key Customer Trends (Women Hairdressing)

Key Customer Segments	Main Services	Key Preferences/Behavioural Patterns
University and college female customers aged (17-25)	<ul style="list-style-type: none"> • Hair cutting and styling • Makeup (occasional) • Hair extensions (occasional) • Manicure and pedicure • Hand dyeing (Hinna) • Eyebrow plucking • Hair dyeing and highlighting 	<ul style="list-style-type: none"> • Purchasing power is relatively lower than other segments • Tend to demand makeup and hair extensions services on special occasions (less often than other segments) • Demand for manicure and pedicure services is rising
Professional female customers aged (25 – 40)	<ul style="list-style-type: none"> • Hair cutting and styling • Makeup • Manicure and pedicure • Hair treatment (occasional) • Hair extensions (occasional) • Manicure and pedicure • Eyebrow plucking • Hair dyeing and highlighting • Body hair removal • Skin care and facials 	<ul style="list-style-type: none"> • Purchasing power is higher than the first segment • Frequency of demand is higher than the first segment • Demand for hair treatment • Looking for a more consultative approach from salons
Brides	<p>All bride beauty services including:</p> <ul style="list-style-type: none"> • Hair cutting and styling • Makeup • Manicure and pedicure • Hair treatment (occasional) • Hair extensions (occasional) • Manicure and pedicure • Eyebrow plucking • Hair dyeing/colouring • Tattooing • Body hair removal • Skin care and facials 	<ul style="list-style-type: none"> • Nature of demand is one-off • Value per one customer purchase is higher than in any other customer segments • Demand for highly skilled hairdressers and beauticians (a key buying decision factor) • Purchasing power is typically higher than other segments
Mature women (over 40 years old)	<ul style="list-style-type: none"> • Hair cutting and styling • Makeup • Manicure and pedicure • Hair treatment (occasional) • Hair extensions (occasional) • Manicure and pedicure • Eyebrow plucking • Hair dyeing/colouring • Body hair removal • Skin care and facials 	<ul style="list-style-type: none"> • Purchasing power is relatively higher than other segments • Female customers within this segment seek a more consultative approach in areas related to beauty, skin care, treatments, etc.

In general, the following observations have been made regarding female customer trends:

- The university and professional female customers are relatively large in size and demand for hairdressing and beauty services is increasing by these two segments.
- The demand for professional manicure and pedicure services is increasing in all segments.
- Reputation of the salon/hairdresser play is a key factor in the buying decision making process.
- Word of mouth and social media are becoming of increased importance to salons in attracting new customers.
- In general, all segments have similar demands. However, the demand for a more consultative selling approach increases as female customers get older in terms of age. The need for high-end beauty therapy services increases for the mature women segment.
- Customer service and communication skills remain a very important consideration for customers within all segments.
- There is some sort of seasonality in demand, particularly at public holidays and social occasions such as wedding and engagement parties, social events, Eid and Christmas holidays. This gives salons the opportunity to target customers within different segments with special seasonal offers.

Key customer trends in the men hairdressing salons sub-sector

The following table shows the key customer segments within this sub-sector and the key services demanded as well as key preferences and behavioural patterns of each segment:

Table 4: Key Customer Trends (Men Hairdressing)

Key Customer Segments	Main Services	Key Preferences/Behavioural Patterns
Young and youth male customer aged 17-25	<ul style="list-style-type: none"> • Mainly hair cutting and styling – often demanding modern hairstyles • Sometimes goatee trimming services are demanded. 	<ul style="list-style-type: none"> • Purchasing power is generally low. • Demand for different services is quite limited to hair cutting and styling. • Word of mouth plays an important factor and usually customers buy the services in groups.
Older male customers (above 25)	<ul style="list-style-type: none"> • Mainly hair cutting and styling – preference turns to more conventional/ elegant hair styling • Hair, moustache, and beard dyeing • Beard and goatee trimming and shaving • Ear and undesired facial hair removal / waxing • Skin care and facial treatments • Nail care services 	<ul style="list-style-type: none"> • Purchasing power is generally higher than the first segment. • Demand for various services • Personal relations with the barber becomes more important

Chapter 2: Skills Demand

2.1. Skills Demand

Current Employment in the Sector

According to the Department of Statistics – Employment Survey (2011), the total number of employees in the established enterprises of the sector is 13,273 employees, with female workers comprising at least 48% of employment in the sector. However, the survey does not include the informal sector, and some missing data on gender means that we can only approximate the proportion of female employees.

According to the Jordan Labour Market Labour Panel Survey (2010), the total number of sector employees amounted to 19,733. This survey is a household survey and it includes the informal sector. Anecdotal information collected from the Sector Team suggests that the actual number of employees may be significantly higher.

Sector enterprises are small in terms of the number of employees. 63% of sector enterprises employ one worker only, whereas about 32% of sector enterprises employ two workers, 5% employ three workers, and only 2% of enterprises employ more than 3 workers³.

According to the Syndicate, the number of trainees and new-entrants to the sector job market has been growing steadily in recent years.

Vacancies in the Sector

Field research shows that the main vacancies in the sector are:

- **Nail Manicure & Pedicure Specialist (*mainly for women but also becoming increasingly in demand by men*):** research shows that the sector is in need for skilled workers who are specialised in this area due to the lack of local workers (both in terms of numbers and skills). More and more 'traditional' women hairdressing salons are interested in offering manicure and pedicure services. In addition, the demand for this occupation remains high at beauty and skin care centres which offer beauty and skin/body care for both female and male customers.
- **Skilled Hairdresser (*for women mainly*):** research shows that the sector is in need for more women hairdressers as the size of demand is high and continues to increase. As customers are becoming more affluent with trendy hairstyles and demand for hair dying is increasing among all age groups (from 18 to 60 years old) of female customers, the need is increasing for highly-skilled hairdressers who are familiar and skilled in trendy hairstyles, hair-cutting, drying and dying techniques.

Customers are increasingly demanding the services of highly skilled hairdressers who are able to provide sound advice on hair care and modern hairstyles as well as hair chemicals and products.

³Source: Department of Statistics – Employment Survey (2011)

In general, female hairdressers remain more preferred by female customers, particularly in the governorates, urban areas as well as the Eastern areas of Amman.

- **Beauty Therapists/Skin Care Specialist(for both women and men – but mainly for women):** research shows that the sector is in need for more beauty therapists and skin care specialists. For female customers, interest is getting higher among all age groups in services related to permanent body hair removal solutions such as laser treatment and other techniques (i.e. body hair removal wax). There is also demand for facial treatments, skin cleansing, exfoliating dead skin, and plucking eyebrows. Married women are getting more and more interested in preoperative and postoperative skin care. Female customers within older age brackets remain interested in services related to facials and skin wrinkle treatments.

The following table shows the main vacancies the sector and their estimated level of demand/urgency:

Table 5: Vacancies in the Sector

Vacancy (Specialisation)	General Description of Vacancy	Estimated Level of Demand/Urgency
Nail Manicure & Pedicure Specialist	The occupation entails performing all kind of nail care services and treatments including cuticle trimming, nail clipping, polishing, foot and leg massages (in some cases), paraffin treatments, and hot oil treatments. Skilled Manicure and Pedicure Specialists (who are becoming increasingly in demand) are expected to be able to introduce to clients new nail styles and colour trends and sell them new products and hand/foot services and treatments.	Very High
Skilled Hairstylist (for women)	The occupation entails performing hairdressing services including cutting, styling, colouring, straightening and waving hair with chemical solutions and hairdressing tools and equipment, as well as provide clients with hair and scalp treatments.	Very High
Beauty Therapist / Skin Care Specialist	The occupation entails performing beauty and skin care services such as performing skin treatments on clients, cleansing skin, removing makeup, performing consultation to determine the most suitable beauty/skin care procedure, exfoliating dead skin, applying chemical peels, removing skin tags and moles, guiding clients on makeup application techniques, using techniques to evaluate extent of sun damage or wrinkles, removing blackheads and whiteheads, applying face masks, applying preoperative and postoperative skin care	High

New Emerging Occupations

The sector has new emerging occupations particularly in the following areas:

- Specialized manicure and pedicure specialists for male customers.

Chapter 3: Skills Supply

3.1. Skills Supply

Education and Training Providers

The hairdressing and beauty education and training providers in Jordan fall under the following categories:

- **Private-Sector education and training providers:**

There is a number of privately-owned education and training providers in Jordan and some of them are recognized on a national and a regional level. Some of the most well-known academies include: French Beauty Academy, and Habawwal Academy. The quality of education and training at the private sector is generally much higher than that at the public sector.

- **Public-sector education and training providers:**

- Ministry of Education: MoE issue public tenders to private training providers to bid and offer education and training programs/courses in the fields of hairdressing and beauty at MoE schools.
- Al Balqa Applied University which does not directly offer education or training programs in the field of hairdressing and beauty. However, sometimes some private-sector training providers get Al Balqa University endorsement of their own certificates.
- VTC training centres which offer general beautification (craftsman), barber (skilled), hairdresser (skilled), barber assistant (semi-skilled), hairdresser assistant (semi-skilled), and beautician assistant (semi-skilled) vocational training courses.

The VTC offers several programmes relevant to hairdressing and beauty services. The following relevant programmes are reported in the 2011 annual report:

Table 6: VTC Vocational training programmes related to hairdressing and beauty services (2011)

No.	Name of the Programme	Level of the Programme	Number of VTC Centres providing the programme	Number of graduates in 2011 Annual Report
29	General Beautification (makeup)	Craftsman	2	10
42	Barber	Skilled	16	344
43	Hairdresser	Skilled	20	330
92	Barber assistant	Semi-skilled	12	46
93	Hairdresser assistant	Semi-skilled	15	292
102	Beautician assistant	Semi-skilled	2	9

Source: Vocational Training Centre, Annual Report (2011).

The following table shows the names of the 15 VTC vocational training institutes which offer the above-listed programmes:

Table 7: List of VTC vocational training institutes in Jordan

Institute	Governorate	Names and Level s of Programmes Offered
Abu Nusair	Amman	- General Beautification (makeup) (Craftsman) - Hairdresser (Skilled)
Ghor Al-Safi	Ghor Al-Safi	- General Beautification (makeup) (Craftsman) - Hairdresser (Skilled) - Hairdresser Assistant (Semi-skilled) - Beautician Assistant (Semi-skilled)
Princess Taghreed		- Barber (Skilled) - Hairdresser (Skilled) - Barber Assistant (Semi-skilled) - Hairdresser Assistant (Semi-skilled)
Tafieleh	Tafieleh	- Barber (Skilled) - Hairdresser (Skilled) - Hairdresser Assistant (Semi-skilled)
Mo'ab	Karak	- Barber (Skilled) - Hairdresser (Skilled) - Barber Assistant (Semi-skilled)
Ramtha	Ramtha	- Barber (Skilled) - Barber Assistant (Semi-skilled)
Mashara		- Barber (Skilled) - Hairdresser (Skilled) - Barber Assistant (Semi-skilled) - Hairdresser Assistant (Semi-skilled)
Mafrq	Mafrq	- Barber (Skilled) - Hairdresser (Skilled) - Barber Assistant (Semi-skilled) - Hairdresser Assistant (Semi-skilled)
Jerash	Jerash	- Barber (Skilled) - Hairdresser (Skilled) - Barber Assistant (Semi-skilled) - Hairdresser Assistant (Semi-skilled)
Hakama	Irbid	- Barber (Skilled) - Barber Assistant (Semi-skilled)
Ajloun	Ajloun	- Barber (Skilled) - Hairdresser (Skilled) - Barber Assistant (Semi-skilled) - Hairdresser Assistant (Semi-skilled)
TTI	Amman	- Barber (Skilled)
Salt Traditional Crafts	Salt	- Barber (Skilled) - Hairdresser (Skilled) - Barber Assistant (Semi-skilled)
Quesmeh	Amman	- Barber (Skilled) - Hairdresser (Skilled)
Hashemiah	Zarqa	- Barber (Skilled)
Sahab	Sahab	- Barber (Skilled) - Barber Assistant (Semi-skilled)
Ain Elbasha (M)	Amman	- Barber (Skilled) - Hairdresser (Skilled) - Barber Assistant (Semi-skilled)
Ain Elbasha (F)	Amman	- Hairdresser Assistant (Semi-skilled)
Yajooz		- Barber (Skilled) - Hairdresser (Skilled) - Barber Assistant (Semi-skilled) - Hairdresser Assistant (Semi-skilled)
Petra		- Hairdresser (Skilled)
Industrial Karak	Karak	- Hairdresser (Skilled)

Institute	Governorate	Names and Level s of Programmes Offered
		- Hairdresser Assistant (Semi-skilled)
Karak (F)	Karak	- Hairdresser (Skilled) - Hairdresser Assistant (Semi-skilled)
Maan (F)	Maan	- Hairdresser (Skilled) - Hairdresser Assistant (Semi-skilled)
Zarqa (F)	Zarqa	- Hairdresser (Skilled) - Hairdresser Assistant (Semi-skilled)
Madab (F)	Madaba	- Hairdresser (Skilled) - Hairdresser Assistant (Semi-skilled) - Beautician Assistant (Semi-skilled)
Middle Ghor	Middle Ghor	- Hairdresser (Skilled)
Marka (F)		- Hairdresser (Skilled) - Hairdresser Assistant (Semi-skilled)

Source: Vocational Training Centre, Annual Report (201:

Chapter 4: Supply and Demand Analysis

4.1. Supply and Demand Analysis

Skill Gaps

Skills gaps can be classified into the following three categories:

Management Skill Gaps

In general, hair salon and beauty centre owners in Jordan need capacity building in broad management skills. Research shows that there are general weaknesses of management skills in all occupations of the sector, particularly in terms of the following skills:

- Organisation skills,
- Leadership skills,
- Time management,
- Accounting and bookkeeping,
- Small business management.
- Customer data, forms and document management

Customer Service and Communication Skill Gaps

Customer care and communication skills are key to satisfy needs of each client and respond to client complaints, as well as making appointments and deal with customers in a friendly and welcoming manner. Customer services and communication skill gaps are seen in all occupations in the sector, particularly in terms of following skills:

- Welcoming customers,
- Making appointments,
- Dealing with customers of different backgrounds and preferences.

Technical Skill Gaps (per ASCO Occupational Categories)

According to the Arab Standard Classification of Occupations (ASCO) 2008, the occupations related to this sector⁴ fall under the following categories:

ASCO Code: 514 – Hairdressing and Skincare Workers

According to ASCO, occupations within this code are classified under the following two sub-sections:

1. ASCO Code: 5141 – Hairdressing Workers

Hairdressing Workers include workers who provide personal hair cutting, dressing and dyeing services. Under this category, the following occupations are listed:

ASCO Code	Occupation Title	Brief ASCO Occupation Description and Key Technical Skills Required
5141013	Hairdresser, General	<ul style="list-style-type: none">• Prepares customers (both sexes) for hair cutting.• Does hair cutting, dressing, dyeing, straightening, and shaving.• Cleans and sanitizes the salon and the tools and equipment.• Fills work forms• Manages staff (subordinates).• Applies occupational health procedures and instructions.

⁴In should be noted that hairdressing and beauty practices in the Jordanian workplaces vary somewhat from the description of the assigned tasks for occupations shown in ASCO.

ASCO Code	Occupation Title	Brief ASCO Occupation Description and Key Technical Skills Required
5141024	Hairdresser, Men	<ul style="list-style-type: none"> • Prepares customers (males) for hair cutting. • Does hair cutting, dyeing, straightening, and shaving. • Cleans and sanitizes the salon and the tools and equipment. • Fills work forms • Manages staff (subordinates). • Applies occupational health procedures and instructions.
5141034	Hairdresser, Children	<ul style="list-style-type: none"> • Prepares customers (children) for hair cutting. • Does hair cutting and dressing. • Cleans and sanitizes the salon and the tools and equipment. • Fills work forms • Manages staff (subordinates). • Applies occupational health procedures and instructions.
5141043	Hairdresser, women/beautician	<ul style="list-style-type: none"> • Prepares customers (Females) for hair cutting. • Does hair cutting, dyeing and straightening. • Cleans and sanitizes the salon and the tools and equipment. • Fills work forms • Manages staff (subordinates). • Applies occupational health procedures and instructions.
5141054	Hairdresser, Wig	<ul style="list-style-type: none"> • Prepares customers (Females) for wig fixing. • Does wig fixing for female customers. • Cleans and sanitizes the salon and the tools and equipment. • Fills work forms • Manages staff (subordinates). • Applies occupational health procedures and instructions.

2. ASCO Code: 5142 – Beauticians and Skincare Workers

This category includes beauticians and skincare workers, who provide personal services to customers in the areas of beauty (including facials), skincare, manicure and pedicure, and nail fixing. Under this category, the following occupations are listed:

ASCO Code	Occupation Title	Brief ASCO Occupation Description and Key Technical Skills Required
5142013	Beautician, Makeup, General	<ul style="list-style-type: none"> • Prepares customers (females) for beauty services. • Determines lotions and beauty materials to use. • Delivers beauty services to female customers. • Delivers beauty services to actors and actresses. • Cleans and sanitizes the salon and the tools and equipment. • Fills work forms • Manages staff (subordinates). • Applies occupational health procedures and instructions.
5142024	Beautician, Makeup	<ul style="list-style-type: none"> • Prepares customers (females) for beauty services. • Determines lotions and beauty materials to use. • Delivers beauty services to female customers. • Does undesired hair removal (laser) • Cleans and sanitizes the salon and the tools and equipment. • Applies occupational health procedures and instructions.
5142035	Fixer, artificial nails	<ul style="list-style-type: none"> • Prepares customers (females) for artificial nail fixing. • Does artificial nail fixing and related care. • Applies occupational health procedures and instructions.
5142045	Pedicurist, Manicurist	<ul style="list-style-type: none"> • Provides manicure and pedicure services. • Applies occupational health procedures and instructions.
5142055	Masseur	<ul style="list-style-type: none"> • Provides massage and skin cleansing services. • Applies occupational health procedures and instructions.
5142065	Tattooist	<ul style="list-style-type: none"> • Does tattoo drawings on customers' skin (both males and females) (both temporary/washable and permanent tattoos) • Cleans and sanitizes the tools and equipment. • Applies occupational health procedures and instructions.

Key technical skills gaps are provided in the following table:

Occupations (ASCO)	Key Skill Gaps in the Jordanian Labour Market
5141043 - Hairdresser, women/beautician	<ul style="list-style-type: none"> • Familiarity with modern hairstyling trends and related skills need to be upgraded especially with regards to techniques related to modern and trendy hair styles. • Knowledge of chemicals and cosmetology need to be enhanced. • Knowledge and application of the procedures and regulations of occupational safety and health need to be enhanced.
5141024 - Hairdresser, men	<ul style="list-style-type: none"> • Familiarity with modern hairstyling trends and related skills need to be upgraded especially with regards to techniques related to modern and trendy hair styles. • Knowledge of chemicals and cosmetology need to be enhanced. • Knowledge and application of the procedures and regulations of occupational safety and health need to be enhanced.
5141034 - Hairdresser, children	<ul style="list-style-type: none"> • Familiarity with modern hairstyling trends and related skills need to be upgraded especially with regards to techniques related to modern and trendy hair styles. • Knowledge and application of the procedures and regulations of occupational safety and health need to be enhanced.
5142013 - Beautician, general	<ul style="list-style-type: none"> • Knowledge of beauty and skin care chemicals and other materials. • Knowledge and application of the procedures and regulations of occupational safety and health
5142024 - Beautician, Makeup	<ul style="list-style-type: none"> • Knowledge of beauty and skin care chemicals and other materials. • Knowledge and application of the procedures and regulations of occupational safety and health
5142045 - Pedicurist, manicurist	<ul style="list-style-type: none"> • Scarcity of pedicure and manicure technical skills in the sector
5142065 – Tattooist	<ul style="list-style-type: none"> • Shortages in tattooing technical skills in the sector. However, tattooing services at hairdressing and beauty salons have been prohibited recently and this service is now provided at some doctor clinics.

Chapter 5: Key Sector Issues and Challenges

5.1 Legal and Regulatory Issues

Based on field interviews and feedback obtained from the first Sector Team Meeting, the following main issues and challenges have been identified for the hairdressing and beauty sector in Jordan – grouped according to common themes in the table below:

Table 8: Main Issues and Challenges of the Hairdressing & Beauty Sector in Jordan

Issues	Implications on the Sector
1. Procedures for licensing and registering a beauty salon and women’s hairdressing are lengthy and burdensome (including Ministry of Interior and Greater Amman Municipality)	<ul style="list-style-type: none"> Lengthy and overcomplicated licensing procedures deter investors from investing in the sector.
2. Existing requirements for licensing and registration do not sufficiently protect customers and there is a need for increased quality control of the qualifications (based on validated occupational standards) and experience required for establishing a business in beauty and hairdressing	<ul style="list-style-type: none"> Negative effects on service quality in the sector as a result of allowing new entrants of below-par qualifications and experience into business.
3. The sector lacks an effective representation (i.e. professional association) to regulate and advocate for the sector, register members, offer professional development for members, and market careers	<ul style="list-style-type: none"> The sector remains fragmented and lacks voice and effective representation. The sector remains without an organizing body that promotes and fosters professional development.
4. Informal sector operators are insufficiently regulated and should be subject to controls comparable with the formal sector	<ul style="list-style-type: none"> Unfair competition resulting from low informal sector prices
5. Non-formal training and apprenticeships need to be support and regulated	<ul style="list-style-type: none"> Negative effects on quality levels and skills development in the sector. Unfair competition to training providers.
6. Only registered dermatologists can do any kind of laser treatment and technicians in beauty salons are not allowed to do this work although the use of some types of laser treatment may be normal practice in other countries.	<ul style="list-style-type: none"> Restricting the sector’s capacity to introduce new and specialized services

5.2 Skills Development Related Issues

Table 9: Skills Development Related Issues and Challenges in the Hairdressing & Beauty Sector in Jordan

Issues	Implications on the Sector
1. There is a critical shortage of skills for areas of work such as manicure and pedicure due to shortage qualified Jordanians and restrictions in foreign labour in this field	<ul style="list-style-type: none"> Restricting the sector's capacity to introduce profitable services that would meet market demand (i.e. manicure & pedicure)
2. Cultural concerns about the appropriateness of occupations within the field of beauty limit the entry of young Jordanians into manicure and pedicure	<ul style="list-style-type: none"> Scarcity of local human resources in fields that are highly in demand (i.e. manicure and pedicure)
3. Training in occupations related to skin care is impacted by contradiction in qualification requirements between MoH (one year training not linked to levels) and CAQA (training linked occupational levels) and financial implications of working with Al Balqa University	<ul style="list-style-type: none"> Negative effects on the business of private-sector training provider
4. Training which is currently available in the public sector in Jordan is low level and in some cases led by under qualified trainers and there is a shortage of specialist/advanced level training for further professional development of professionals in the field	<ul style="list-style-type: none"> Negative effects on quality levels and skills development in the sector.
5. Evidence of complaints and feedback from business owners indicates lack of skills for the management of salons including business management and accounting	<ul style="list-style-type: none"> Negative effects on profitability and consequently the competitiveness of the sector
6. Customer service is poor especially in terms of welcoming and advising the customer and inspiring customer confidence	<ul style="list-style-type: none"> Negative effects on the demand levels, customer satisfaction and consequently the competitiveness of the sector.

Chapter 6: Sector Development Plan

6.1 Strategic Goals and Results

Based on research findings and brainstorming during Sector Team meetings, the following are the strategic goals and results to achieve in order to develop the sector:

Strategic Goal(s)	Results (Objectives)
The investment environment and quality standards are enhanced to enable increased calibre and competitiveness of the industry	<ul style="list-style-type: none"> • Procedure for licensing salons is streamlined and simplified and time and effort needed by potential investors to carry out the procedure is reduced.
	<ul style="list-style-type: none"> • Quality standards for services provided by beauty and hairdressing salons are reviewed, developed and implemented so customers are protected from bad or inadequate quality service.
	<ul style="list-style-type: none"> • The syndicate/professional association for beauty and hairdressing is empowered to engage effectively in the regulation and improvement of the profession.
	<ul style="list-style-type: none"> • An advocacy plan is developed to lobby for an investment environment which better supports the further growth and competitiveness of the sub-sector (including Laws and regulations covering tenancy, sales tax and social security, which negatively affect the profession)
	<ul style="list-style-type: none"> • Measures to support and regulate and control the informal sector are specified and undertaken in cooperation with the concerned parties
The standard and quality of training in beauty and hairdressing is enhanced and qualifications' requirements identified to meet the current and future needs of the industry	<ul style="list-style-type: none"> • Programmes for beauty and hairdressing are revised in response to evidence of mismatch between demand and supply
	<ul style="list-style-type: none"> • Qualifications requirements for skin care training are determined and agreed on between the sector and government agencies to remove duplication and increase efficiency of training.
	<ul style="list-style-type: none"> • Advanced level professional development courses in specialised areas of hairdressing and beauty are offered for trainers and professionals
	<ul style="list-style-type: none"> • Small business are supported to develop business and customer service skills
	<ul style="list-style-type: none"> • Successful models in recruiting and retaining Jordanians who practice manicure and pedicure are studied and examined and results disseminated to other salons to handle the shortage in this skill area.

6.2 Implementation Plan

Strategic Goal 1: The investment environment and quality standards are enhanced to enable increased calibre and competitiveness of the industry					
Result (objective)	Performance Indicator	Activity	Responsible person(s)	Timeframe	Resources required
Procedure for licensing salons is streamlined and simplified and time and effort needed by potential investors to carry out the procedure is reduced.	A proposal to reduce duplication and bottlenecks in the process of licensing a salon is discussed (in minuted meetings) with relevant bodies and presented for approval, by mid-2014.	Analyse the process and identify where duplication, bottlenecks, high costs and delays occur	Sofian Sughayer	Feb 2014	External researcher for specific areas
		Make recommendations to the relevant bodies on streamlined procedures	-Sofian Sughayer -Raed Dabash -Nadera Al Bakheet	March 2014	External researcher for specific areas
		Develop an advocacy plan for simplifying and streamlining the process	-Eyad Samara -Nadera Al Bakheet	April 2014	External researcher for specific areas
		Secure agreement on the implementation of the advocacy plan	Eyad Samara	June 2014	
Quality standards for services provided by beauty and hairdressing salons are reviewed, developed and implemented so customers are protected from bad or inadequate quality service.	A proposal on the minimum quality standards for establishing and operating beauty salons is discussed (in minuted meetings) with relevant bodies and presented for enforcement, by end of 2014.	Develop proposed minimum standards for establishing and operating hairdressing and beauty salons and consult with Syndicate members	Ayman Habawwal	Feb 2014	-Syndicate -ETVET Council
		Considering the potential role of an empowered syndicate, consult with existing licensing bodies and inspectorate services about how to enforce agreed standards	Eyad Samara	June 2014	-Syndicate -ETVET Council
		Follow upon the implementation of the minimum standards on the salons	-Hiba/CAQA -Hala	Dec 2014	Sector team
The syndicate/ professional association for beauty and hairdressing is empowered to engage effectively in the regulation and improvement of the profession.	A proposal and implementation plan to enhance the role and mandate of the syndicate is discussed with relevant bodies (in minuted meetings) and presented for enforcement by end of 2014	Review the regulations (laws and bylaws), mandates and functions of Professional Associations for Beauty and Hairdressing in other countries and identify value-added benefits to the sub-sector	Anees Naber	Feb-June 2014	MOL Labour Relations
		Identify the practices that can be adopted and the benefits of adopting them	-Anees Naber -Nadera Al Bakheet	July 2014	
		Develop and present to the relevant organisations an implementation plan for enhancing the mandate of the existing Syndicate	Raed Dabash	September 2014	

Goal 2: The standard and quality of training in beauty and hairdressing is enhanced and qualifications' requirements identified to meet the current and future needs of the industry					
Result (objective)	Performance indicators	Activity	Responsible person(s)	Timeframe	Resources required
Programmes for beauty and hairdressing are revised in response to evidence of mismatch between demand and supply	(3) training programs are adapted to bridge the skill demand-supply gaps by Sep 2014 and started to get implemented in 2015.	Analyse the NCHRD report on demand and supply provided by NCHRD	Nadira Bakheet	April-June 2014	ETVET Council
		Identify the nature and extent of mismatch between supply of graduates and demand for skills	Nadira Bakheet	June 2014	
		Confirm anecdotal evidence of the need for enhanced skills in the areas of business management and customer service skills	Ms.Nadira Bakheet	June 2014	
		Propose changes to training programmes needed to meet the demand for skilled workers and have it approved by CAQA	Ayman Habawwal	September 2014	
		Execute training programs funded by ETVET Fund	Ayman Habawwal	During 2015	ETVET Fund
Activate vocational classification and specification related to the skin care occupation and improve the procedure of occupational licensing	Vocational classification and specification related to skin care occupation is developed and activated by mid-2015	Compare actual practice with ASCO occupational classifications and develop occupational descriptions for Jordan based on actual practice	Faris Al Zagha	June – August 2014	
		Complete a review of international practice for laser qualifications and beauty salon practices in other countries	Faris Al Zagha	June – August 2014	Mr. Mohammed Khair from CAQA
		Discuss conclusions with CAQA and agree on required qualifications in order to be adopted in Jordan	Eyad Samara	Sep 2014	
		Explore potential benchmarking partners and select the appropriate partner	Eyad Samara	Oct 2014	
		Form an agreement to share information about the programmes for benchmarking purposes	Eyad Samara	Dec 2014	
		Conduct benchmarking comparison and report on recommended features and good practices for adoption in Jordan	Ayman Habawwal	March 2015	

Result (objective)	Performance indicators	Activity	Responsible person(s)	Timeframe	Resources required
Administrative and technical skills for practitioners and TVET trainers are developed in response to changing needs of the labor market	(3) professional development programs (administrative and technical) are designed and delivered to TVET trainers and professionals by end of 2015.	Conduct training needs analysis for TVET trainers and practitioners in the administrative and technical areas	Faris Al Zagha	Oct-Dec 2014	
		Design training programs based on training needs	Anis Al Naber	Feb 2015	-Syndicate -Training providers -CAQA
		Deliver professional development training workshops based on needs analysis	Anis Al Naber	July – Dec 2015	
Raise awareness of youth (men and women) in the sector occupations and their prospects	A media campaign to encourage Jordanian youth to work in the sector is conducted by the end of 2014	Develop a media plan to encourage youth to work in the sector	Nahid Safi	June-Oct 2014	ETVET council
		Identify and highlight successful models of workers in the sector	Nahid Safi	June-Oct 2014	
		Market the sector to donor organizations in order to support employment of men and women youth	Nahid Safi	June-Oct 2014	