شغل الخليل

HEBRON'S LEATHER & SHOE CLUSTER

التجمع العنقودي لصناعة الجلود والأحذية في الخليل

2022 - 2026

Strategy

January 2022

Contents

1. Shoe Industry in Hebron, Palestine

Hebron, the largest city in West Bank in terms of both population and area, has a population of between 170,000 and circa 250,000 (the governorate has a population more than 750,000). It is a major commercial and industrial hub of Palestine, with 22% of Palestine's industrial establishments. Hebron accounts for 55% of Palestine's commercial activities and 45% of industrial sector output. It has more than 3,200 industrial establishments, 98% of which are micro or small. Within this industrial sector, it produces high quality and hand crafted goods and is well known for its shoes and leather products, which make up 75% of the shoe and leather industry in Palestine.

The footwear and leather sector is comprised of approximately 230 footwear manufacturing firms and 13 tanneries, mainly family-owned SMEs that employ on average less than 10 employees. Leather tanneries are the major suppliers (60%) of raw material to local shoemakers. Employment levels stand at approximately 2,500 workers, 88 % of whom are employed in the footwear subsector. Annual shoe production in the sector is 6 million pairs of shoes which represents 40% of the total capacity. These gaps in the order flow leads to intermittent periods with little or no work in the factories.

The value chain appears to include a well-integrated supply chain. An example is the strong relationships between the tanning industry and footwear producers, resulting in a steady supply of raw material. Other essential parts like sole can often be sourced locally.

Sales of footwear show 90% to local markets including the sales to inside green line markets) and 10% to export. Jordan & The Gulf states are the main export markets.

2. About Leather and Shoe Cluster

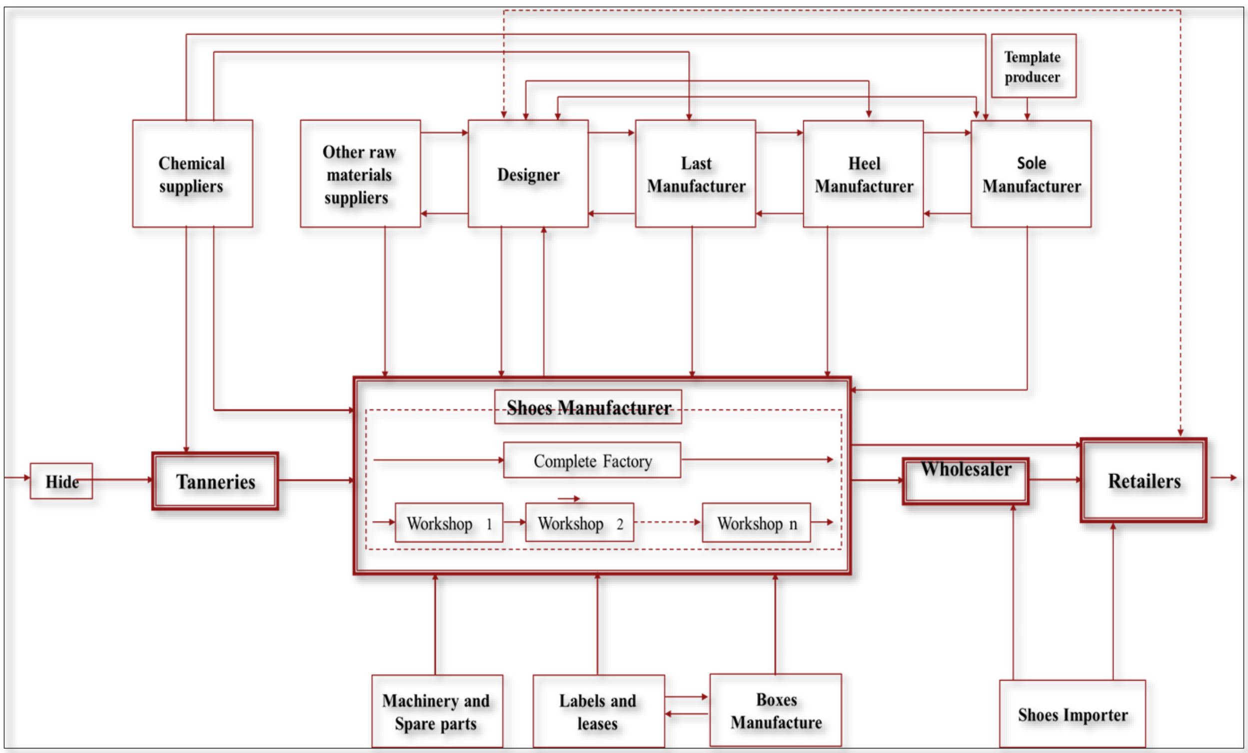
Leather and Shoe Cluster (HLSC) has been established in 2013 by Federation of Palestinian Chambers of Commerce and Industry (FPCCIA) in cooperation with Ministry of National Economy (MoNE) and hosted in Hebron Chamber of Commerce and Industry (HCCI) for the purpose of enhancing the collective cooperation as an approach for private sector development. HLSC has been established through adapting related international best practices to benefit from the past experience of other clusters around the world.

The philosophy of HLSC is all about encouraging the collaborative work and relationships among cluster members to ensure the following:

- Enhancing the competitiveness of Palestinian leather and shoe industry
- Enhancing the capacity of cluster members

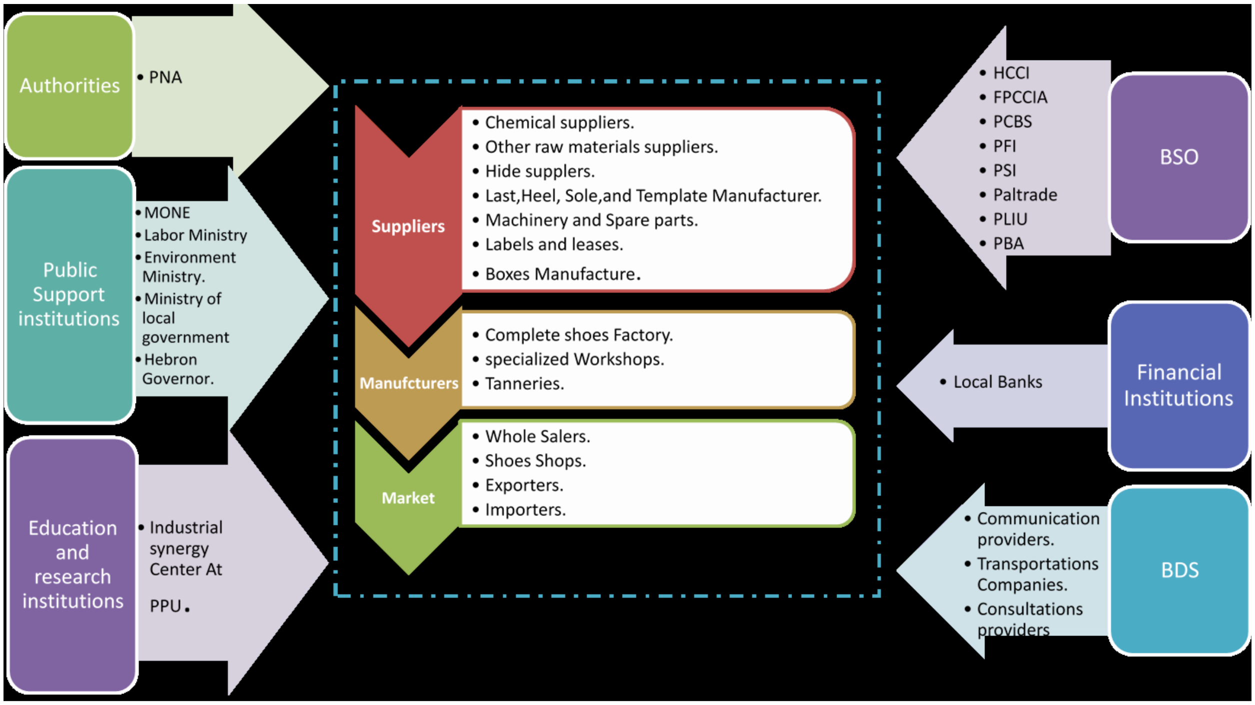
- Facilitation of new market access
- Integrating the efforts towards supporting the leather and shoe industry and mitigating the risks

Since its establishment, HLSC was successful in laying the foundations for effective and sustainable collaborative work and was able to prove the benefits of the adapted clustering approach. The number of HLSC members exceeded 100 and it became a gateway for the shoe industry to new markets access and to capacity building support.



Hebron Leather and Shoe Cluster Value Chain

Indeed, the leather and shoes cluster is part of a wider case that included different privet sector organizations, public organizations, financial organization, BDS providers, Educations organizations, and the cluster members. shows the leather and shoes cluster map



Leather and Shoe Cluster Map

3. Review of L&S Previous Cluster Strategy from 2014

The previous strategy of Leather and Shoe Cluster was developed by the supporting cluster development project and focused on laying the foundations of the clustering approach through:

- Establishing the cluster model and service portfolio
- Establishing regular cooperation scheme
- Showing the benefits of clustering
- Offering a set of requested services

Even it was oriented to meet the supporting project goals, HLSC was successful in achieving more than the stated objectives and targets as the achievements covered the following:

- Establishment of an effective cluster management unit
- Enhancing collective market access, where 3 collective selling stores opened locally and abroad in addition to an online sales platform
- Innovation and R&D, where a shoe testing lab and a training center in addition to a shoe making diploma has been established in cooperation with local partners.
- Networking, where the cluster was successful in building a wide network locally and abroad

- Maturity and sustainability, where the cluster maintained stable operation and steady development over the past 7 years.

4. Achievements

The following is a sample of the cluster major achievements:

- Offering more than 22 training courses for leather and shoe factories
- Three market studies conducted for foreign markets, Jordan, Russia, and Kazakhstan.
- Establishment of the Leather and Footwear Products Development Center (LFPDC) in cooperation with Palestine Polytechnic University (PPU), HCCI, Palestinian Federation of Leather Industries (PFLI), and Ministry of National Economy (MoNE).
- Establishment of leather and shoe testing lab.
- More than 10 business missions to international trade exhibitions and potential customers.
- Developing an academic diploma for shoe production in cooperation with PPU
- Developing shoe technical standards and specifications in cooperation with Palestinian Standards Institution (PSI).
- International cooperation for product development and market linkages
- Establishment of four selling pointes (B2B & B2C) for the cluster products; two in Hebron, one in Amman- Jordan, and an e-commerce platform.
- Qualification and capacity building for selected shoe factories in different aspects such as quality management, ISO9001 certification, and KAIZEN/Lean management…etc.
- Establishing a shoe sewing unit operated by women

5. Current Situation Analysis

Analysis of the current situation has been conducted in reference to the new areas of focus that have been changed since the establishment of the cluster. At the beginning; the main focus was on spreading the clustering idea as an economic development model and showing its benefits where now the focus has been shifted to new dimensions related to sustainability, innovation, and enhancing industry competitiveness and market access capability.

Analysis of the current situation has been pointed in two directions;

- Cluster member analysis as a basis for services
- Cluster management unit as a basis for sustainability

5.1 Cluster Member's Situation Analysis

Current situation of cluster members was the basis of identifying collective challenges and needs where services will be designed accordingly to enhance cluster members' capacity.

5.1.1 SWOT

The following table summarizes the common strengths and weaknesses of leather and shoe companies in addition to the major opportunities and threats in the business environment:

<table>
<tr><td rowspan="2">SWOT</td><th>Opportunities</th><th>Threats</th></tr>
<tr><td>- Approval of local technical regulations for shoes
- Available supporting partners
- Distribution partnerships and business linkages in target markets
- Increasing appreciation of local shoe quality
- Institutional support
- Increasing shipping cost of imports
- Decreased competition in the local market</td><td>- Unavailability of chemical materials needed for tanning
- Open market policy imposed by government
- No controls over the imported low quality and low price products
- Consumer preference of low price shoes
- Increasing raw material cost
- Increasing wages
- Agents and middlemen acquire the biggest portion of the profit margin
- Actual enforcement of the developed technical regulations not started yet where it might be partially implemented
- Easiness of importing very small shipments from Turkey
- Political & security
- Labor transfer from the industry to the Israeli market
- Increasing environment protection requirements</td></tr>
<tr><th>Strengths</th><th colspan="2">Key Considerations</th></tr>
<tr><td>- Long experience in leather and shoe production
- Remarkable and trusted area brand
- Good product reputation and local consumer trust
- Availability of raw hide
- High collective production capacity
- Agility
- Keeping up with the latest global fashion trends
- Good experience with local</td><td colspan="2">❖ Encourage innovation and product development
❖ Ensuring more exposure in the target markets
❖ Enhance and spread the cluster brand “شغل الخليل”
❖ Search for substitutes of tanning chemical agents
❖ Lobbying to speed up the enforcement of technical regulations
❖ Adapting suitable cost reduction measures
❖ Establishing reliable channels with the target markets
❖ Develop a new market penetration strategy
❖ Develop the cluster’s social responsibility
❖ Develop a collective marketing plan
❖ Increase the local market share</td></tr>
</table>

and foreign collective sales	❖ Expansion through more collective selling points ❖ Adapt environment protection practices ❖ Creation of a brand for regional origin “made in Palestine shoes” ❖ Alignment with Regional development strategy: Triple Helix” ❖ Improve the marketing, with heritage, shared logo, all communication possibilities of all “made in Palestine shoes” logo ❖ Linkage with international value chains ❖ Linkage with ecosystem actors: design, training, innovation, financial sources, value chain reinforcement ❖ Business and financial literacy training for Cluster members employers. University linkage ❖ Training program along value chains knowledge for employers. University and Vocational skill training
Weaknesses	
- Decreasing overall sales - Poor marketing skills - Very limited focus on external markets - Product prices are not competitive comparing with similar products in the international markets - Poor occupational safety and health conditions - Unclear social responsibility including environment protection and women engagement	

5.1.2 PESTLE

The following are the major challenges commonly faced by the majority of companies within the value chain of leather and shoe industry:

Aspects	Major Risks/Challenges	Impact	Mitigation Measures

Political	Poor control on trade across borders	Market share is lost because of uncontrolled entrance of low quality and low price products	Regional development strategy: Triple Helix Attract foreign investors with appealing legal/economic framework
	Movement restrictions	Poor presence in target markets	International distribution partnerships
Economic	Open market strategy of the Palestinian government	Protection of national products became more difficult	Creating heritage brand Made in Palestine shoes Spreading notion of the economic importance of sector, turnover, jobs, taxes paid, GDP contribution, etc
	Absence of nontariff barriers		
	No controls on the entry of low quality and low price products to the market		
	Developing market trends and fashion ideas	The cost of following the latest market trends is increasing	Gradually upgrading models and production techniques
	Increasing cost of inputs and labor wages	Shrinking profit margin	Increasing production with international linking: productivity and competitiveness increase
Social	Preference of remarkable brands (high class customers)	Difficult to raise prices	Cost control with productivity increases
	Preference of low price products (public)		
Technological	Too many innovative design ideas	Risk of losing market share	LFPDS

	appear every day		
Legal	Technical regulations not implemented yet	The market is still open in to low quality footwear imports	Lobbying to sped up the implementation of technical regulations
	Weak judicial system	Difficulty of protecting trademarks	Local and international registration of brands to avoid copying and imitation
	Limited protection of intellectual property and brand protection		
Environmental	Imposed limitations on tanning	Increased leather cost	R&D

5.2 Cluster Management Unit

Identifying the limitations, challenges, and roles of the cluster management unit was the basis of defining the cluster's strategy to ensure sustainability and continuity of guidance and development.

5.2.1 SWOT

The following table summarizes the strengths and weaknesses of the leather and shoe cluster management unit:

	Opportunities	Threats
SWOT	• Availability of national industrial cluster strategy/agenda. • Increased interest among the development partners in collective approaches. • Availability of potential funding opportunities	• Lack of recognition in the cluster entity induce limitations on access to finance, fund raising and engagement in future cooperation agreements. • Competition with other business support institutions for this industry. • Lack of appropriate regulatory structure that can support/accelerate cluster growth.

<table>
<tr><td></td><td>particularly for collective structures
• Increased interest in R&D, innovation and internationalization</td><td>• Weak overall business environment
• Decline in the shoe making industry in Palestine
• CV-19 pandemic and its effects on conducting business globally (networking, new agreements, global projects …etc.)</td></tr>
<tr><th>Strengths</th><th colspan="2">Key Considerations</th></tr>
<tr><td>• Experienced Cluster management.
• Very good reputation for the L&S cluster.
• Well-known brand for the cluster.
• Revenue generating services for members and none members (testing services).
• Good network domestically and internationally.
• Availability of the leather & footwear product development center (testing, design and training).
• Good attraction point (Hebron shoe shop physical and virtual domestically and in Jordan).
• Signed cooperation agreements with local and international partners (academia and research centers, PSI, Tunisian Leather center)
• Representation for the whole value chain of leather and shoes industry.
• Availability of leadership.</td><td colspan="2" rowspan="3">❖ Enhance the capacity of the cluster in fundraising and credit access
❖ Increase/improve tailor-made service provision to members (financial sustainability prospects and new attraction for members’ engagement).
❖ Capitalize on the success of the shoe shop through expansion of the chain domestically and regionally.
❖ Digitalization joint strategy formulation with cluster leaders group and Triple Helix actors
❖ Tap into virtual platforms to facilitate new market opportunities and internationalization.
❖ Activation of the LFPDC and all its services to its full potential (financial sustainability & value to members).
❖ Engage in international cooperation agreements with focus on research and development, innovation and internationalization.
❖ Cluster restructuration toward autonomy. Identification of the next generation of cluster leaders for digital age
❖ Creation of new attractions to members (services, market access facilitation, knowledge creation …)
❖ Enhance internal and external communication with focus on member’s engagement and potential partner’s attraction.
❖ Enhance the profile of the Cluster Management Unit within the Triple Helix ecosystem. Keep enhancing leadership and strong well prepared Cluster management representatives</td></tr>
<tr><th>Weaknesses</th></tr>
<tr><td>• Vulnerable regulatory structure for the cluster.
• Decline in members and particularly active members’ engagement.
• Lack of membership fees that can ensure financial sustainability.
• High dependency on external funding to maintain cluster organization.
• Deterioration in the support from host institutions.
• Lack of autonomy in managing cluster resources and interventions.
• Decline in the exposure and outreach</td></tr>
</table>

capacity (internal & external). • Lack of support HR resources (communication, fundraising, project management ...e.tc), mostly dependent on the cluster manager. • Decline in networking events and interventions implementations. • Gap in relationship with the decision and policy makers. • Lack of R&D projects.	

5.2.2 PESTLE

The following are the major challenges faced by the leather and shoe cluster management unit:

Scope	Potential Risks	Impact	Mitigation measures
Political	• Restrictions on movement and access of peoples and goods. • Deterioration in the political situation.	• Limit the Capacity to develop traditional services • Limitation in outreach to new partners and cooperation agreements •	• Increase dependency on virtual platforms and tools. • Update the cluster promotion and website to indicate comprehensive literature and background data on (services, scope, interest, members, success stories, events, press releases ….etc.)
Economical	• Deterioration in the economic situation in Palestine.' • Decline in the leather & shoe making industry. • Increase dependency on the imports. • Increase in the cost of production inputs (particularly imports)	• Decline in the interest in the sector and thus the potential for member's engagement. • Decrease the prospects for cluster financial sustainability through decline in purchase of cluster services and membership fees.	• Offer innovative services • Increase the focus on internationalization efforts and particularly market access facilitation. • Focus on R&D toward product development and local inputs.
Social	• Decrease in the trust among members • Individualistic attitude of	• Decrease in the interest in collaborative	• Establish good governance structure. • Attract role models and

	members and institutions	approach. • Increase in the negative dynamics can jeopardize cluster reputation	influential leaders. • Aggressive communication strategy. • Offer unprecedented innovative services. • Facilitate emergence of new startups with innovative ideas in L&S.
Technological	• Loose the interest in traditional services • Lag behind in technological updates	• Decrease in the interest to join the cluster. • Decrease the potential for new partners and cooperation projects.	• Focus on R&D and innovative intervention and services. •
Legal	• Absence of legal registration form for clusters • Competition from other support institutions • Lack of autonomy to decide on future	• Limitations on institutional and official arrangements • Lower the capacity to offer services and thus question the financial sustainability. • Can't engage in in new partnership agreements. • Limited capacity to raise fund and access to finance.	• Cooperation with business support institutions • Lobby for appropriate structure for clusters. • Discover other legal potential legal instruments that could support the cluster autonomy (new company regulations) • Maintain good relations with support institutions
Environmental	• Mandatory and market environmental regulations that affect the business of cluster members.	• Decline in cluster members' accessibility to international markets	• Commission collective projects based on sustainable production, green business and circular economy principles. • Offering new environmental services (members' capacitating, new product development, recycling …etc).

6. Cluster Strategy

Hebron Leather and Shoe Cluster's strategy is directed to two major aspects;

>> Enhancing the cluster management capacity and ensuring sustainability

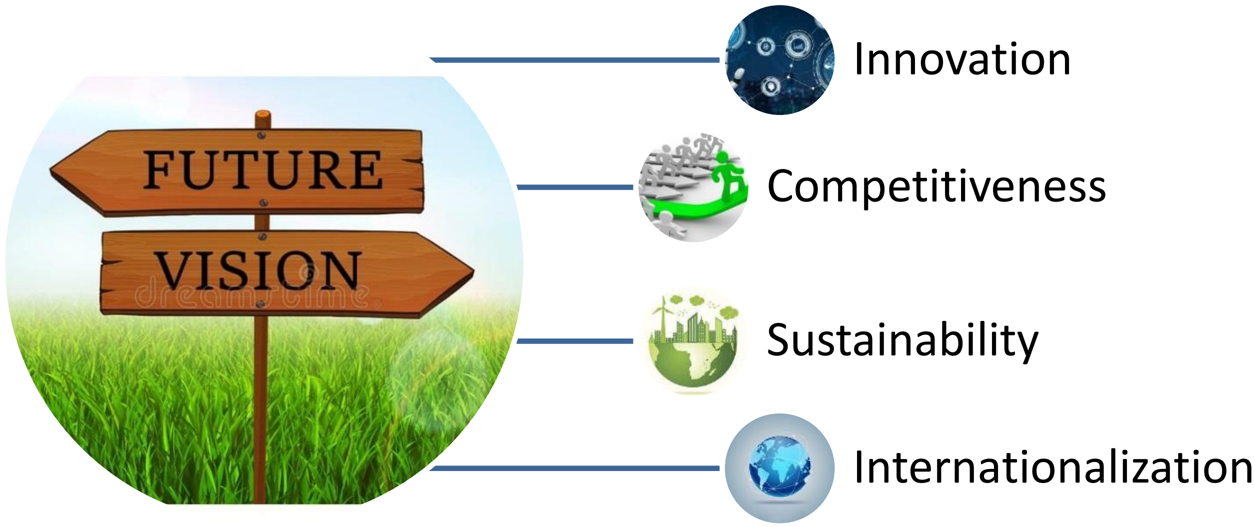
>> Ensuring the necessary support to cluster members to enhance their competitiveness and market access capability

6.1 Vision

HEBRON Leather and Shoe Cluster to become the recognized Leading Actor in the Palestine´s Leather and Shoe sector and broader Palestine Business Ecosystem

تجمع شغل الجهة الرائدة في صناعة الأحذية والجلود في فلسطين وضمن الشبكات التجارية بين فلسطين والعالم

6.2 Through:


FUTURE
VISION
Innovation
Competitiveness
Sustainability
Internationalization

6.3 Mission

Hebron Leather and Shoe Cluster is a collaborative group of companies within the shoe industry value chain and supported by related business support institutions working to enhance the competitiveness of cluster members and improve their market access capability though offering a wide range of innovative services and strengthening the interrelationships to ensure integrated response to market dynamics.

تجمع شغل الخليل عبارة عن مجموعة من الشركات العاملة ضمن سلسلة القيمة في صناعة الأحذية والجلود والمؤسسات الداعمة للصناعة والتي تعمل سوياً لرفع كفاءة أعضائها وزيادة قدرتهم على الوصول للأسواق المستهدفة من خلال توفير خدمات متنوعة ومتطورة بالإضافة لتعزيز الروابط بينها لضمان الاستجابة التكاملية لمتغيرات السوق

6.4 Strategic Directions

	Cluster Management Unit	Services
Competitiveness	Increase the capacity of the cluster team. Including leadership and contacts	Ensuring more exposure in the target markets
	Improve the structure/status for the cluster.	Enhance and spread the cluster brand "شغل الخليل"
	Attract new cluster members to increase cluster mass.	Establishing reliable channels with the target markets
	Attract new partnerships domestically and internationally	Develop a new market penetration strategy Agreement on key knowledge areas to reinforce within the leather & shoe value chain
	Develop communication strategy (internal & external) Increase presence and partnerships in the Triple Helix ecosystem (politics, financial, academic, IT digitalization, e-commerce, marketing, legal, transport, etc.)	Develop a collective marketing plan
		Increase the local market share
		Expansion through more collective selling points
		Lobbying to speed up the enforcement of technical regulations
Enhancing competitiveness is a crucial requirement to ensure development	At cluster management level, the focus is on the agility of the cluster management unit	At cluster members' level, the focus is on members' capacity building and offering necessary guidance and support
Innovation	Facilitate the R&D and innovative projects and services	Develop the cluster's social responsibility Innovation strategy formulation
	Facilitate market access domestically and internationally	Adapt environment protection practices and renewable energy
	Enhance the capacity of cluster members in modern management, administrative, technical and	Engagement of women and youth entrepreneurs

	marketing Establish structured incubation function	Intellectual property and copy right protection
Innovative solutions are needed to adapt to the new market requirements	At the cluster management level, the focus is on the facilitation of innovative ideas and adaptation to new market dynamics, including digitalization	At cluster members' level, the focus is on quickly reacting to the new market dynamics. Identification of the next generation of cluster leaders for the digital age
Sustainability	Enhance the fundraising capacity Development of revenue generating services. Operating the LFPDC to its full potential Expand the chain of the shoe shop domestically and internationally (physical and virtual) Develop membership contribution structure	Adapting suitable cost reduction measures Encourage innovation and product development Search for substitutes of tanning chemical agents
Ensuring sustainability is a baseline for any future development	At cluster management level, the focus is on financial sustainability	At cluster members' level, the focus is on increasing revenues and profit margin
Internationalization	Collaborative and collective partnerships with international partners Awareness of international trends in sector and distribution	International Exhibitions Trade missions Advanced technical training & know-how
	At cluster management level, the focus is on identification, awareness and agreements with international value chains, suppliers, Distribution chains	At cluster members' level, the focus is on capacity to create attractive competitive shoes adapted to international differentiated global demands

Project 1: Capacity building of cluster management unit

Initiative	Employment	Training	Mgmt. System	Communication
Increase the capacity of the cluster team	X	X		
Improve the structure/status for the cluster			X	x
Attract new cluster members to increase cluster mass				X
Attract new partnerships domestically and internationally				X
Develop communication strategy (internal & external)			X	X
Enhance the capacity of cluster members in administrative, technical and marketing		X	X	
Enhance the fundraising capacity		X	X	
Development of revenue generating services			X	
Develop membership contribution structure			X	
Project 1: Capacity building of cluster management unit	• Employment of necessary personnel	• Management training • Fundraising training	• Develop the legal and management structure • Develop communication strategy • Administrative, technical and marketing training for cluster members • Development of revenue generating services • Develop membership contribution structure	• New members attraction • Develop international partnership map • Develop communication strategy • start choosing the leading team for innovation

				strategy development

Project 2: Increase momentum

Initiative	Investments	Innovation	Networking & Promotion
Facilitate the R&D and innovative projects and services		X	x
Facilitate market access domestically and internationally			X
Establish structured incubation function		X	
Operating the LFPDC to its full potential	X		X
Expand the chain of the shoe shop domestically and internationally (physical and virtual) e-commerce	X	X	X
Collaborative and collective partnerships with international partners			X
Project 2: Increase momentum	• Employment of related staff • Promotion of LFPDC services • Shoe shop chain expansion plan	• Develop R&D and incubation structure • start team building for innovation strategy	• Develop cluster services promotion plan • Promotion of cluster presence in Triple Helix actors

Project 3: Capacity building of cluster members

Initiative	Better Practices	Integration with New Market	Collective Efforts

		Dynamics	
Develop a new market penetration strategy			X
Develop a collective marketing plan			X
Lobbying to speed up the enforcement of technical regulations			X
Develop the cluster's social responsibility			X
Adapt environment protection practices and renewable energy		X	
Engagement of women and youth entrepreneurs		X	
Intellectual property and copy right protection		X	
Adapting suitable cost reduction measures	X		
Encourage innovation and product development	X		
Search for substitutes of tanning chemical agents	X		
Advanced technical training & know-how		X	X
Project 3: Capacity building of cluster members	• Cost analysis training & coaching • Publish annual shoe market trends • Identify substitute chemicals and their sources • create partnerships/agreements with ecosystems actors to provide services to cluster members with special advantages:	• Conduct environment impact analysis across the shoe industry • Set environmental risk mitigation plan • Develop an interactive employment platform showing promising employment opportunities for	• Develop a new market penetration strategy • Develop a collective marketing plan • Lobbying to speed up the enforcement of technical regulations • Develop the

	Universities, financial institutions, IT suppliers, University, vocational schools, marketing, design,etc	women and youth • Awareness of cluster members on the importance intellectual property an facilitate collaborative effort towards copyright protection	cluster's social responsibility •
Timeframe	**2022 - 2024**	**2023 – 2025**	**2024 - 2026**

Project 4: Market access arrangements

Initiative	**Promotion**	**Arrangements**	**Investment**
Ensuring more exposure in the target markets	X		
Enhance and spread the cluster brand "شغل الخليل"	X		
Establishing reliable channels with the target markets		X	
Increase the local market share		X	X
Expansion through more collective selling points		X	X
International Exhibitions		X	
Trade missions		X	
Project 4: Market access arrangements	• Develop promotion plan	• Market scanning to identify potential markets • Market research • Feasibility analysis of new suggested shops • Identify promising international events • Identify potential buyers in target markets	• Discuss potential market opportunities with cluster members • Establishing new collective selling points

Timeframe	**2022 - 2024**	**2022 – 2024**	**2023 - 2025**

7. Action Plan

	Task	Activity	2022	2023	2024	2025	2026
Project 1: Capacity building of cluster management unit	Employment	Employment of necessary personnel					
	Training	Management training					
		Fundraising training					
	Mgmt. System	Develop the legal and management structure					
		Develop communication strategy					
		Administrative, technical and marketing training for cluster members					
		Development of revenue generating services					
		Develop membership contribution structure					
	Communication	New members attraction					
		Develop international partnership map					
		More communication with stakeholders (in reference to the communication strategy)					
Project 2: Increase momentum	Investments	Employment of related staff					
		Promotion of LFPDC services					
		Shoe shop chain expansion plan					
	Innovation	Develop R&D and incubation structure					
	Networking & Promotion	Develop cluster services promotion plan					
		Promotion					
Project 3: Capacity building of cluster members	Better Practices	Cost analysis training & coaching					
		Publish annual shoe market trends					
		Identify substitute chemicals and their sources					
	Integration with New Market Dynamics	Conduct environment impact analysis across the shoe industry					
		Set environmental risk mitigation plan					

	Task	Activity	2022	2023	2024	2025	2026
		Develop an interactive employment platform showing promising employment opportunities for women and youth					
		Awareness of cluster members on the importance intellectual property an facilitate collaborative effort towards copyright protection					
	Collective Efforts	Develop a new market penetration strategy					
		Develop a collective marketing plan					
		Lobbying to speed up the enforcement of technical regulations					
		Develop the cluster's social responsibility					
Project 4: Market access arrangements	**Arrangements**	Market scanning to identify potential markets					
		Market research					
		Feasibility analysis of new suggested shops					
		Identify promising international events					
		Identify potential buyers in target markets					
	Promotion	Develop promotion plan					
	Investment	Discuss potential market opportunities with cluster members					
		Establishing new collective selling points					

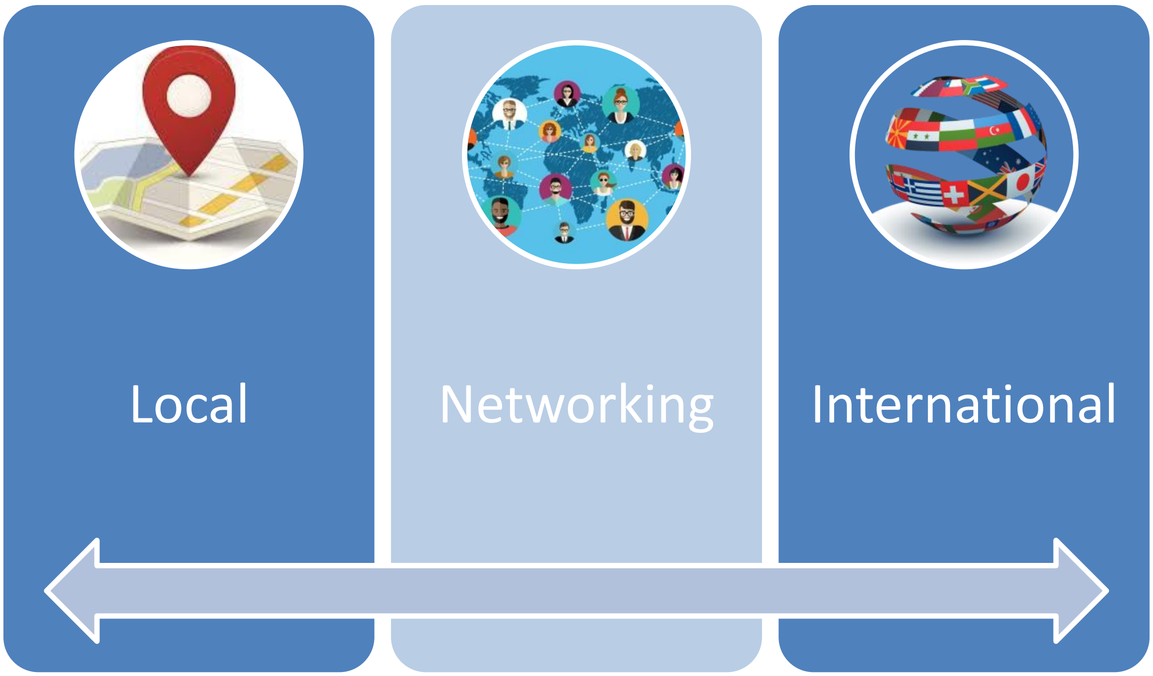
8. Membership

Since the establishment of the HLSC, joining cluster activities was open to all interested companies to become cluster members.

The absence of formal recognized registration for the cluster has limited the development of a solid cluster membership. 60% of the cluster members are active members and usually involved in the cluster regular meetings and activities.

50% of the cluster members are shoe manufactures who cover almost all type of shoes, 20% are tanneries, 10% sole makers, 5% designers, 15% raw materials suppliers.

9. Partnership



HLSC Partners

Local Partners	International Partners
Hebron Chamber of Commerce and Industry	**Tunisia National Leather Center**
Palestine Polytechnic University	**Italian National Association Manufacturers of Footwear, Leather Goods and Tannery Technologies "ASSOMAC"**
Palestinian Standard and Specification Institution	
Palestinian Federation of Leather Industries	