

CREATING AN EVIDENCE BASE FOR EFFECTIVE VOCATIONAL & LIVELIHOODS TRAINING

A Comparative Analysis of Twenty-Four Market
Assessments throughout South Sudan



CREATING AN EVIDENCE BASE FOR VOCATIONAL & LIVELIHOODS TRAINING
A COMPARATIVE REPORT OF TWENTY-FOUR MARKETS THROUGHOUT SOUTH SUDAN

Prepared for:

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In cooperation with:



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ACRONYMS

CPA	Comprehensive Peace Agreement
GoNU	Government of National Unity
GoSS	Government of Southern Sudan
GRSS	Government of the Republic of South Sudan
IDPs	Internally Displaced Person
LRA	Lord's Resistance Army
NGOs	Non-Governmental Organizations
SAF	Sudanese Armed Forces
SPLM/A	Sudanese People's Liberation Movement / Army
TVET	Technical and Vocational Education and Training
UNHAS	United Nations Humanitarian Air Service
WFP	World Food Programme
ADRA	Adventist Development and Relief Agency
CBO	Community Based Organisation
CIDA	Canadian International Development Agency
DRC	Democratic Republic of Congo
FAO	Food and Agriculture Organisation of the United Nations
FGD	Focus Group Discussion
GER	Gross Enrolment Rate
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
IBM-SPSS	Predictive Analytics Software
ILO	International Labour Organisation
IOM	International Organisation for Migration
KII	Key Informant Interviews
MDGF	Millennium Development Goals Achievement Fund
MSF	Medecins Sans Frontiers
NER	Net Enrolment Rate
NPA	Norwegian Peoples Aid
OECD	Organisation for Economic Cooperation and Development
SPCR	Sudan Productive Capacity Recovery Programme
SSP	South Sudan Pounds
UMCOR	United Methodist Committee on Relief
UNKEA	Upper Nile Kalaazar Eradication Association
UNDP	United Nations Development Programme
UNICEF	United Nations Children's Fund
UNIDO	United Nations Industrial Development Organisation
UNHCR	United Nations High Commission on Refugees
USAID	United States Agency for International Development
TREE	Training for Rural Economic Empowerment
TVSD	Technical Vocational Skills Development
YEP	UN Joint Programme on Youth Employment
VSLA	Village Savings and Loan Association
VSF	Veterinaires Sans Frontieres

MARKET TERMS

- **Rolex (rolexes):** Fried eggs often with some tomato, onion, and salt, rolled in a chappati (typically consumed for breakfast). Originally from “Rolled Eggs.”
- **Mandazi:** Often fist-sized, a cake made from fried dough.
- **Hiace:** Also known as a matatu, is a minibus used for public transport. It averages 12 seats.
- **Rosa:** Larger than hiaces or matatus, they are also used for public transport but tend to travel farther. Average seating of 24.
- **Boda boda:** A motorcycle, most often used as taxis.
- **Rickshaw:** A three-wheeled motorcycle, with a covered bench in the back. Often known as *tuk-tuks*. Used as taxis.
- **Dobbi:** Laundry. Signs with “Dobbi” written on them provide laundry services.

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EXECUTIVE SUMMARY

This report presents a comparative analysis of twenty four skills and market assessments undertaken by Forcier Consulting (FC) between May 2011 and December 2012. These assessments occurred in cooperation with nine development partners, including the Canadian Red Cross, IOM, PLAN International, Save the Children in South Sudan, UMCOR, UNHCR, UNIDO and the UN YEP & the MDG Achievement Fund. The International Labour Organisation (ILO) commissioned this report in order to formulate a broad overview of market opportunities and intra-state dynamics in South Sudan, enabling organisations to better tailor their programming to the needs of targeted beneficiaries and ensure that existing programming addresses market needs. This report was released alongside *The Manual for Conducting Market Assessment: South Sudan*, which was created out of this iterative process of these assessments.

On July 9, 2011, South Sudan declared its independence and seceded from (Northern) Sudan. Secession followed two decades of civil war and an internationally brokered peace agreement in 2005. The impact of the civil wars and history of systematic neglect from the Government of Sudan (GoS) dropped the new country to the bottom of the world's development indexes. This report assesses one aspect of this legacy, namely the dearth in foundational education and vocational skills training that resulted from lost opportunities during the war. Recognizing the impact of gaps in education and training on livelihoods—particularly for youth—facilitates a clearer vision towards mitigating negative community impact and bolstering opportunities for individuals and their employment sectors.

The twenty-four assessments utilize a consistent methodology based on the ILO *Training for Rural Economic Empowerment* (TREE) manual tailored to the local context and to the specific objectives of the individual projects. Four surveys were conducted in each location: a Consumer Demand for Goods Survey; a Consumer Demand for Services Survey; a Market Opportunities Survey; and a Retailer Qualitative Protocol. In some locations, supplementary qualitative research tools such as Focus Group Discussions (FGDs) and Key Informant Interviews (KIs) were incorporated. A total of 1,512 people were interviewed utilizing the Consumer Demand Survey and 1,324 utilizing the Market Opportunity Survey as part of these assessments.

This report is divided into four parts. Part I details the key findings and conclusions when examining the data at a macro-level combining the lessons learned from all twenty-four assessments. Parts II, III and IV give market profiles for each of the locations of research divided by Greater Equatoria, Greater Bahr el-Ghazal, and Greater Upper Nile, respectively. Parts II-IV are intended as location specific guidelines for government agencies and development partners who may be interested in implementing activities in those particular areas. Depending on the scope and nature of the original assessment, these profiles may be tailored towards specific beneficiaries (refugees, women, youth, etc.).

Data from these twenty four market assessments were compared in order to identify common themes across livelihoods zones and the greater areas. The following findings emerged:

1. Markets in South Sudan are extremely diverse and influenced by a number of factors including livelihoods, trade routes, border proximity, cost to market, and consumer purchasing power. High

degrees of particularity mean effective programming should be tailored to the specific intervention areas.

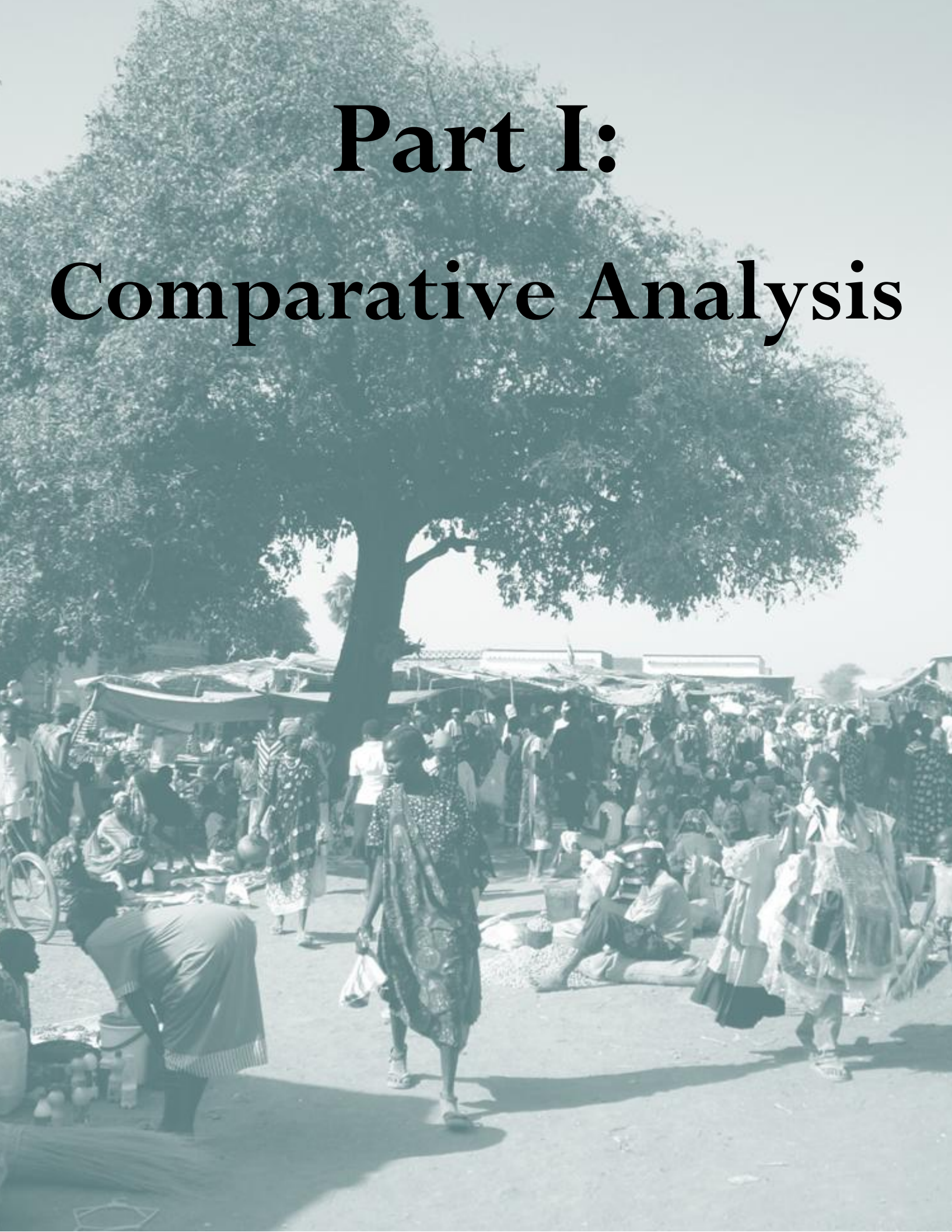
2. Regardless of the training programme, location, or skill set, all vocational training and livelihoods programmes should be constantly preparing graduates to enter the marketplace. Helping trainees understand the market and equipping them with the necessary skills to approach the market (including soft skills) is crucial to ensuring the success of graduates. Linking programmes to ongoing support initiatives like village savings & loan associations is also strongly recommended.
3. Training in commonly recognized “urban” vocations must be evaluated for local applicability. Skills including plumbing, generator repair, vehicle maintenance, and computer repair may have only limited market potential in peri-urban settings surrounding Juba. Urban settings do offer their own unique opportunities, especially in areas such as construction, masonry, and cooling systems.
4. The demand for agricultural tools produced by welders and blacksmiths varies greatly in different regions of the country; Greater Equatoria is adequately supplied from Kenya and Uganda with moderate quality, low-price goods. Conversely, areas of Greater Bahr el Ghazal and Greater Upper Nile demonstrate high demand for locally produced agricultural tools and repair services, meaning employment potentials differ greatly by location.
5. There is a need for horticultural products in almost every market. Horticulture is a female-friendly occupation that increases dietary diversity in the household. In a similar fashion, fishing is a highly underexploited line of business. The value chains of both industries, including canning, food processing, agro-processing, and production of oils all possess significant market potential.
6. There is a need to redefine “traditional” female occupations in order to achieve greater gender parity in competitive and relevant vocations.

In reviewing the twenty-four skills and market opportunity surveys some common skills gaps, and market and consumer patterns emerged. These trends provide insights to better match education and vocational training to labour market needs, as well as the potential for new markets and market growth. The aggregate analysis permits the following conclusions and recommendations to be drawn.

- Goods are bought by a far larger section of the populace than services are utilized. Therefore, **local production of goods** is in general in higher demand than service provision. This should be taken into account when providing vocational and skills training, as often it focuses on the latter rather than the former.
- Increased agricultural output should be a top priority, as currently the majority of produce is imported and consumers are dissatisfied due to price and shortages. Programmes should focus on **teaching people how to grow vegetables**, as well as general farming practices such as row planting and irrigation techniques.
- **Processing groundnuts, sesame and shea nuts to produce oil** should also be investigated, as this is a relatively low-tech process which will open up a new market and add value to a familiar crop.

- **Highly skilled services such as plumbing and electricians are not in high demand** due to the scarcity of people who have access to indoor plumbing and electricity. Services such as general appliance repair are more relevant to the needs of larger urban labour markets.
- **Most people prefer to buy imported secondhand clothes from Uganda and Kenya rather than use local tailors** for the majority of their clothing, therefore tailoring is not a service area with large potential for growth.
- **People often fail to see livestock, dairy and poultry products as a potential business opportunities**, instead keeping produce for their own consumption. Training on using livestock and poultry to produce a range of products for the market should be given greater attention.
- **Catering is the most-used service**, and has high levels of dissatisfaction for reasons ranging from price to hygiene and packaging. Catering training, both for restaurants and for local street foods such as rolexes, mandazi and thamia should therefore be a key area of focus.
- **Basic literacy and numeracy and business and financial skills should be incorporated into all vocational and skills training programmes**, as many people lack both education and business knowledge and therefore find it difficult to fully succeed in business.
- **In many areas language barriers make it difficult for people to find work and or grow their businesses.** English lessons should therefore be offered in conjunction with vocational and skills training program

Part I: Comparative Analysis



01/INTRODUCTION

This report is a consolidation of market assessments for vocational skills training and livelihoods activities conducted in South Sudan by Forcier Consulting. The assessments cover nine states, twenty-four specific locations, sponsored by nine different development partners between June 2011 and December 2012. By collating this information, a broad view of market opportunities in South Sudan emerges, enabling organisations to tailor their programmes to the needs of different areas.

This report is divided into four parts. Part I details the key findings and conclusions when examining the data at a macro-level combining the lessons learned from all twenty-four assessments. Parts II, III and IV give market profiles for each of the locations of research divided by Greater Equatoria, Greater Bahr el-Ghazal, and Greater Upper Nile, respectively. Parts II-IV are intended as location specific guidelines for government agencies and development partners who may be interested in implementing activities in those particular areas. Depending on the scope and nature of the original assessment, these profiles may be tailored towards specific beneficiaries (refugees, women, youth, etc.).

1.1/CONTEXT

On July 9, 2011, South Sudan declared its independence and became the world's 193rd country and Africa's 54th state. Unlike other postcolonial states, South Sudan's independence was not granted at the discretion of a non-belligerent colonial power. Instead, decades of armed conflict with the North culminated in an internationally brokered peace in 2005 that allowed the option of independence and separation.

The Comprehensive Peace Agreement (CPA) between the Government of (Northern) Sudan and the Sudan People's Liberation Movement/Army (SPLM/A) ended two decades of civil war in the region and established a shared system of governance between the Government of National Unity (GoNU) in Khartoum and the semi-autonomous Government of Southern Sudan (GoSS). Since that time, the GoSS has been responsible for the governance of the region now known as South Sudan. In accordance with the terms of the CPA, the GoSS conducted a referendum on self-determination in January 2011, which resulted in an overwhelming turnout, almost universally voting in favour of secession.

In July 2011, the newly independent country secured statehood and immediately dropped to the bottom of the world's development indexes. Of the 8.26 million South Sudanese, the under-30 population is markedly larger, indicating a significant youth bulge.¹

Since schools were closed or destroyed throughout much of the population's childhood, about three-quarters of adults are unable to read.² Only one per cent of households have a bank account.³ Half of

¹ Population Distribution by Main Geographical Areas Age and Sex, 5th Sudan Population and Housing Census - 2008

² Statistical Yearbook of Southern Sudan 2010, Southern Sudan Centre for Census, Statistics and Evaluation. 23.

³ Ibid.

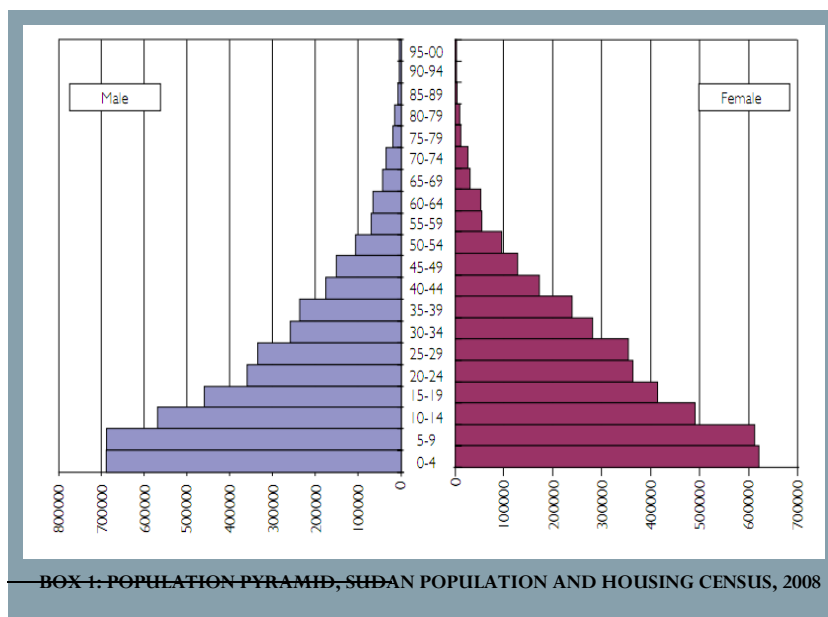
South Sudanese (50.6%) live beneath the national poverty line of 72.6 SDG per month and 47.0% are food deprived.⁴ As a consequence, the vast majority of South Sudanese face numerous challenges in securing sustainable livelihoods to support themselves and their families.

The huge influx of refugees and internally displaced persons (IDPs) further complicates the existing political dynamics in the country. During the course of decades of war, millions of southerners fled north and to the neighbouring countries of Uganda, Kenya and Ethiopia to escape the fighting and conflict. Since the 2005 CPA, people have been returning to their homes in the South. According to the Southern Sudan Relief and Rehabilitation Commission, 1,812,300 internally displaced people and refugees returned to South Sudan between 2004 and 2008.⁵ As of 29 March 2011, 52,805 former refugees and IDPs have returned to Northern Bahr el Ghazal, 8,828 of whom returned to Aweil North County.⁶ The partition of Sudan into two independent states resulted in additional returnees, as those associated with the South yet living in the North were compelled to leave. After several years living as IDPs in the North and refugees abroad, those returnees face significant challenges reintegrating into their former communities. Many villages and towns lack basic services to accommodate the number of people coming back. As a result, returning families struggle to survive without adequate drinking water, health services, education, food and shelter, and a means of livelihood.

1.2/LITERATURE REVIEW

YOUTH AS A VULNERABLE POPULATION

As a consequence of the decades of civil war that gripped the country during most of their childhood, few of the two-thirds of the South Sudanese population that is currently under the age of 25 received



either formal education or vocational training.⁷

According to UNICEF's baseline study of the education sector in the region, the war "almost totally extinguished secondary education in the South, together with vocational and technical education, post-secondary institutions, teacher education, higher education,

⁴ "Poverty in Southern Sudan: Estimates from the 2009 National Baseline Household Survey", Southern Sudan Centre for Census, Statistics and Evaluation.

⁵ Statistical Yearbook of Southern Sudan 2010, Southern Sudan Centre for Census, Statistics and Evaluation.103.

⁶ "Number of Returnees by County, 30 October 2010-29 March 2011," UN-OCHA. Code SS-0182a, 30 March 2011.

⁷ Statistical Yearbook for Southern Sudan 2009, Southern Sudan Centre for Census Statistics and Evaluation.

and adult education.”⁸ In 2009, four years after the CPA was signed, primary school enrolment was still staggeringly low: net enrolment was at 48 per cent, and on average, of those enrolled, less than 20 per cent would complete all eight years of schooling.⁹ This gap in formal education opportunity has been further exacerbated by the dearth of vocational training institutions available to those who dropped out of the formal education system. Prior to the conflict, few vocational training institutions existed in the region due to systematic neglect by the North, and those that were in existence were destroyed or fell into disrepair during the war.

The debilitating effect of these lost educational opportunities will become more and more apparent as children of the war years mature into adults. Already, lack of education has translated into high rates of unemployment and limited self-sufficiency among youth, underscoring the need for non-formal education programming for this segment of the population. Following its study of youth livelihoods in South Sudan, the Women’s Commission for Refugee Women and Children found that “without targeted and appropriate interventions, [youth] will remain idle or in low-skilled and possibly exploitative jobs, a wasted potential resource to support the region’s reconstruction and development.”¹⁰ Plan Canada’s surveys of the South Sudanese population have found “growing insecurity” caused by “frustration due to unemployment and lack of regular salaries for those working with the government.” As a 2011 report by the Humanitarian Policy Group argues, the absence of labour opportunities for urban youths is seen as a direct causal factor of the increased gang activity in Juba.¹¹

Studies indicate that increased education results in increased output in multiple sectors, including agricultural work. For example, in Ghana, researchers found that even when other factors are held constant, just one additional year of schooling increased agricultural output by between 2.5 and 5 per cent.¹² Due to the skewed population pyramid (Figure 1), both the GoSS and the non-governmental organisations (NGOs) operating in South Sudan recognize that empowering the youth and equipping them with the skills necessary to make their own livelihoods will be critical for the future. Atari et al argue: “With growing numbers of returnees and demobilised ex-combatants, technical, vocational and

⁸ Marc Sommers. *Islands of Education: Schooling, Civil War and the Southern Sudanese (1983-2004)*. Paris: International Institute for Education Planning, 2005, 70.

⁹ *Starting from Scratch: The Challenges of Including Youth in Rebuilding Southern Sudan*, Women’s Refugee Commission, September 2010

¹⁰ *From the Ground Up: Education and Livelihood in Southern Sudan*, Women’s Commission for Refugee Women and Children, 2007

¹¹ For more information on the relationship between unemployment and gangs in Sudan see: Sara Pantuliano, Margie Buchanan-Smith, Victoria Metcalfe, Sara Pavanello and Ellen Martin, *City Limits: urbanization and vulnerability in Sudan*. ODI: Humanitarian Policy Group Report, January 2011. In this report, the authors note: “Respondents in Juba stated that the rise of gang culture was linked to feelings of insecurity, the lack of protection provided by the state and lack of employment opportunities; conversely, gang membership gave youth a sense of social inclusion and belonging.”

¹² Psacharopoulos, 1995, cited in *A Report of the Study on Socio-Economic and Cultural Barriers to Schooling in Southern Sudan*, Government of South Sudan, Ministry of Education, Science and Technology, November 2008

entrepreneurial capacity is needed for development and reconstruction in South Sudan.”¹³ Mathok Madol Mathok, a leader of a youth organization in Rumbek State argues that improved access to education must be the focus of efforts to facilitate the region’s recovery. “The neediest thing as a citizen of southern Sudan and also as a youth at the same time is education,” he writes. “During the war, many of us didn’t go to school because the youth were also at war...so we did not get time to study. After the war, we need education to develop our country.”¹⁴

NEED FOR VOCATIONAL TRAINING¹⁵

Traditionally, the people of South Sudan have relied upon cattle rearing, crop production, fishing, wild food collection (including hunting), and trade as their means of livelihood contingent upon location within the seven key livelihood zones of the country: the Eastern Flood Plains; the Greenbelt; Hills and Mountains; Ironstone Plateau; Nile and Sobat Rivers; Western Flood Plains; and Arid/Pastoral.¹⁶ Most zones rely heavily on cattle rearing, while others such as the Greenbelt, Hills and Mountains and Ironstone Plateau are more focused on growing crops. Nonetheless, agriculture and livestock remains the mainstay for the 87 percent of South Sudanese. Despite its popularity as a livelihood strategy, agriculture and cattle herding remains an underutilised occupation and should be a prime target of livelihood training programmes. A 2011 study by the World Food Programme (WFP) found that “only 4% of arable land is cultivated, total livestock production is 20% of the potential, while fish production is only about 10% of the potential. These provide immense opportunities to enhance the overall economic and social well-being in South Sudan.”¹⁷

“There is, therefore, a need to empower these categories of youth through provision of training in life skills and livelihoods at all levels targeting agro-based farming, livestock, fisheries, physical infrastructure in roads and housing sectors and other professional trades which would lead to creation of jobs and improvement of socio-economic status of the population. This is because young people are the building blocks of a country’s economy and the most essential human resource and present a demographic opportunity that can be directed to positively impact on the future of the country.”

*--Dr. Riek Machar Teny.
Vice President of the Republic
of South Sudan*

¹³ Dominic Odwa Atari, Samer Abdelnour, Kevin McKague and Robert Wagner, Technical, Capacities in Southern Sudan: Assessment and Opportunities.

¹⁴ *Youth Leader Says Better Access to Education Needed in Southern Sudan*, VOA News, April 25, 2010, <http://www.voanews.com/english/news/africa/Youth-Leader-Says-Better-Access-to-Education-Needed-in-Southern-Sudan--92062059.html>

¹⁵ Quote from Keynote Speech at the ILO-AU-IGAD Employment for Peace, Stability and Development in the Horn of Africa Stakeholders and Development Partners’ Conference. Addis Ababa, Ethiopia, 11-12 April 2011.

¹⁶ *Annual Needs and Livelihoods Assessment (ANLA) 2009/2010*, World Food Programme; See also, Comparative Statistics, UNOCHA, 2008

¹⁷ WFP (2011)

The WFP’s policy prescriptions are challenged by organisations such as the Women’s Refugee Council, which argues that these traditional subsistence livelihood options have failed to translate into a viable basis for sustainable development, particularly for youth and returnees.¹⁸ Following her study of the unique challenges facing South Sudanese youth, Maura Brazil of ACDI-VOCA concluded that they would “benefit from business training and apprenticeships, access to finance for small businesses (potentially in groups) and complementary services such as mentoring, training in financial literacy and encouragement in cultivating savings.”¹⁹ Given the significance of development in the agricultural and livestock sectors, however, a focus on developing agricultural, livestock and fishery skills through vocational training would greatly benefit both the economy and local employment in a sustainable way.

In recognition of the need for both increased educational opportunities and vocational skills training, the GoSS, with support from the UN Joint Programme on Youth Employment has begun a cross-ministry approach to technical and vocational education and training (TVET) involving the ministries of Labour, Youth, and Education.

Beyond agriculture, studies indicate that auto mechanics, carpentry and the service and hospitality sector have the potential for high labour demand.²⁰

CHALLENGES AND WEAKNESSES OF EXISTING VOCATIONAL TRAINING

Insufficient Capacity

In its general review of vocational training programming worldwide, the ILO found that in many cases these training programs were not sustainable. Non-governmental organizations often imported sophisticated machines and equipment to allow trainees to acquire new skills. After the programmes were transitioned, however, the recipient administrations were financially unable to maintain the equipment, replace damaged parts or provide the materials for future training.

Although the Government of South Sudan has embarked upon its own vocational training program, the Ministry of Education’s department for vocational education was described by staff as “not at all functional” due to the lack of operational funding. Given the high cost of materials in Juba, this lack of funding is particularly problematic.²¹

Gender Barriers to Participation

¹⁸ *Starting from Scratch: The Challenges of Including Youth in Rebuilding Southern Sudan*, Women’s Refugee Commission, September 2010.

¹⁹ *Opportunities Grow for Youth in Southern Sudan: Young People Need Training, Access to Credit*, ACDI/VOCA

²⁰ *Starting from Scratch: The Challenges of Including Youth in Rebuilding Southern Sudan*, Women’s Refugee Commission, September 2010.

²¹ Pantuliano et al, 2011.

Gender roles and barriers differ throughout the country. In rapidly urbanizing areas such as Juba, for example, women are increasingly engaged in informal livelihood activities such as small business ownership, microfinance borrowing, and employment in restaurants.²² Involvement in these sectors has given women enhanced economic autonomy. Despite this progress, social norms often prevent women from participating in vocational training programs. At the sole vocational centre in Northern Bahr-el-Ghazal State, only 10 per cent of the students were female—and half of them dropped out prior to completion of the nine-month course.

Rigid Entry Requirements for Formalised Certifications

Vocational training courses run by the South Sudanese government have often adopted the Northern government's minimum entry requirement, requiring the completion of Primary 8 (P8) prior to enrolment. However, in the South, the number of people whom have completed eight years of schooling is so low that those who have reached this level consider themselves too highly educated for manual labour. As a result, aspirations within this subset tend to be higher and interest in vocational training, except for courses like computer and secretarial work, is low. Ironically, those who have not completed primary schooling are the ones most willing to undertake manual labour and in need of skills training, however they do not meet the entry requirements set by government-run centres.

Misalignment with Labour Market

The vocational training courses currently operating in South Sudan are not necessarily aligned with labour market needs. Courses were generally set up under the assumption that since there were no training opportunities at all, any and every type of skills training is beneficial. Consequently, with very few exceptions, courses were set up without prior studies of the local labour market and the courses offered were driven by supply rather than demand. The lack of efforts to systematically assess market demand has resulted in young people being trained in skills that do not meet the needs of the local labour market, or being trained in a trade that is in demand, but to a standard that is not adequate for the

²² Ellen Martin, *Gender, Violence and Survival in Juba*

BOX 2: AFRICAN UNION VOCATIONAL TRAINING GUIDELINES

Training providers should:

- Provide training within national policy framework;
- Develop business plans to support training activities;
- Establish strong linkages and collaboration with employers and industry;
- Mainstream gender into training activities and programmes;
- Institute bursary schemes for poor trainees;
- Strengthen guidance and counselling services to trainees;
- Network and bench-mark with other providers.

Parents and Guardians Should:

- Support children and wards to choose the vocational education stream;
- Reject perception that TVET is for the less academically endowed.
- Lobby politicians in favour of TVET
- Support activities of training providers.

Donors and Development Partners Should:

- Support development of national TVET policies and strategies;
- Fund TVET research and advocacy;
- Support capacity building in TVET sector
- Help in identifying and disseminating best practices in TVET
- Support TVET advocacy initiatives

Employers Should:

- Deliver workplace training to employees
- Contribute financially to national training fund
- Provide opportunities for TVET teachers to regularly update their workplace experience.

local market. Most courses have made no systematic attempts to follow up on graduate employment rates and any increase in incomes post-training, making it difficult to assess their impact.

Lack of Standardisation

Currently, South Sudan lacks a standardised system for vocational training. Consequently, there is an extremely wide variation of standards among the courses offered by different training providers. This variation makes it difficult for employers to evaluate, compare or trust qualifications obtained within South Sudan. It was brought up in discussions with youth that employers prefer to hire people from neighbouring countries where standards are generally much higher.

Best Practices

There are few comprehensive cases studies on vocational training in settings similar to South Sudan. Most examples of successful vocational training programmes come from middle-income countries such as South Africa and Jordan, or fully industrialised countries such as South Korea and Germany. These countries do not face the same level of poverty or lack of businesses as South Sudan. The German model was frequently applied to developing countries in the 1980s and 1990s, but to such little success that it is cited as a cautionary tale of the dangers of exporting models to different contexts. Commonly cited African examples of best practices such as Ghana provide some insight, but comprehensive studies of TVET programmes in post-conflict settings similar South Sudan do not exist. With these caveats, some generally transferrable best practice guidelines do exist and are best expressed by the African Union's 2007 Strategy to Revitalize Technical and Vocational Education and Training (TVET) in Africa²³, as shown in Box 2.

SUGGESTED APPROACHES

1. Match Training to Needs of Employers

Generally speaking, the design or type of the programme is “less important compared to labour market orientation and the quality of the training provided.”²⁴ When the desired outcome is employability by existing industries, it becomes essential that TVET programmes be tailored to the needs of companies within these industries. To accomplish this, many studies recommend that programmes facilitate industry buy-in by including target industries in the design and implementation of the programmes. Ideally, industries will benefit from more qualified young employees and will eventually be able to support—or even run—the training programmes. TVET training should include attachments to small and medium enterprises; these attachments should constitute at least 3 months of every training year.²⁵

²³ *Strategy to Revitalize Technical and Vocational Education and Training (TVET) in Africa*, Meeting of the Bureau of the Conference of Ministers of Education of the African Union (COMEDAF II+) 29-31 May 2007, Addis Ababa, Ethiopia.

²⁴ Evangelischer Entwicklungsdienst (2010), *Comparative Study and 'Outcome and Impact Analysis of Six Vocational Training Projects in West Africa*, Bonn: EED.

²⁵ Evangelischer Entwicklungsdienst (2010), *Comparative Study and 'Outcome and Impact Analysis of Six Vocational Training Projects in West Africa*, Bonn: EED.

2. Integrate Basic Education into Vocational Training

The African Union Guidelines note that the utility of basic education is especially high in post-conflict settings because such settings lack educational infrastructure and resources. Noting that, “basic education enhances effective vocational training,” the AU guidelines advocate for literacy and numeracy programmes to be delivered concurrently with livelihood skills training programmes. Ideally, the AU guidelines state, other skills such as parenting, human relations, language skills, human rights, and politics should be integrated into vocational training. Such comprehensive vocational programmes may not be possible in micro interventions, and are more feasible at a larger scale, such as in the development of a national or regional system of vocational training institutions.

3. Prioritize Skills Development in Informal Sector

The OECD notes: “In particular, in the majority of African countries where the informal sector is dominant, Technical vocational skills development (TVSD) reforms should recognize and emphasize skills development, such as business management and entrepreneurial training” (OECD, 2008).

4. Encourage Industries to Formalise

Formalization is vital to the long-term viability of South Sudan, as well as to the protection of the labour force. Formalization increases the likelihood that the company will pay taxes—a central component of state formation.²⁶ At the same time, formalisation will increase the likelihood that workers are protected by national labour regulations and oversight.²⁷

5. Combine Microfinance lending with Vocational and Business Training

A randomised control study of female micro-entrepreneurs in Peru found that microfinance lending and business training were mutually beneficial.²⁸ Business skills enabled these women to better utilise their loans. For the microfinance institutions, business training improved client retention. With relatively few vocational training opportunities available to women in South Sudan, microfinance provides an important tool in enabling women to start their own businesses. This is especially true in the informal sector.

6. Ensure Equitable Access

Ensuring access to vulnerable and disadvantaged populations should be the first priority of any vocational training intervention. In a review of vocational training programmes in Botswana, interviewees prioritised “access and equity”, and the authors noted that sustainable interventions would

²⁶ For a detailed discussion of the importance of tax collection on state formation in post-conflict environments, see: Jonathan Di John (2011) *Taxation, Resource Mobilisation, and State Performance*. Working Paper. Crisis States Research Centre Working Paper 84 (series 2). London School of Economics.

²⁷ Allan Larsson, *Empowerment of the Poor in Informal Employment*, Commission on Legal Empowerment of the Poor, January 2006.

²⁸ Dean Karlan and Martin Valdivia, *Teaching Entrepreneurship: The impact of Business Training on Microfinance Clients and Institutions*, May 2009.

be “meaningless if they cannot be accessed by all citizens, irrespective of their status.”²⁹ One way to promote broad access is to implement non-formal, rather than formal, training programmes. As a review of TVET programmes in six West African states found, “the cost efficiency and the short-term cost benefit are higher for non-formal and apprenticeship training compared to formal vocational education and training.”³⁰ The benefits of non-formal vocational training are especially pronounced for youth and married women.

7. Tailor Programmes to Fit the Needs of Women

Programmes that target women must be tailored to fit the specific needs of women in that particular market or employment/livelihood sector. In South Sudan, as in other countries, this means broadening training beyond job-specific skills. As the EED West Africa survey found, “The promotion of employment of females needs more than good quality training. Partners need to survey markets and identify employment and income opportunities beyond the stereotype set of trades offered to females at the moment. More emphasis is required for life skill and personality development, the quality of these sessions (e.g. use of participatory methods) needs to be improved. Social counselling should be gender specific. Advocacy is needed to address labour access and inequality issues.”³¹

8. Quality Control

Done correctly, TVET programmes provide valuable skills to youth. Yet, oversight is a significant challenge because the government of South Sudan lacks the capacity to regulate, accredit and inspect the quality of both government and non-state providers.

²⁹ Matthews Lebogang Phiri, “A Survey of Experiences and Practices in Current Use for Integrating Education for Sustainable Development in TVET in Botswana.”

³⁰ Evangelischer Entwicklungsdienst, 21.

³¹ Evangelischer Entwicklungsdienst, 21.

02/METHODOLOGY

All assessments used a consistent methodology based on the ILO “Training for Rural Economic Empowerment (TREE)” survey instruments, sometimes with slight variations brought about by context and complementing objectives of the projects. For all locations, however, the following surveys were conducted:

- 1) Consumer Demand for Goods Survey;
- 2) Consumer demand for Services Survey;
- 3) Market Opportunities Survey;
- 4) Retailer Qualitative Protocol.

Depending on the projects’ specific tools, objectives, and guidelines, other supplementing data generation tools were incorporated, from added Focus-Group Discussions (FGDs) to Key Informant Interviews (KIIs). These tools and their methodologies are explained in detail in the “South Sudan Market Assessment Manual” that is a complimentary output of this assignment. Table 1 lists the times and location of assessment surveys and the organisations and projects, who sponsored them including a brief listing of the additional tools utilised.

TABLE 1 MARKET ASSESSMENTS CONDUCTED BY FORCIER CONSULTING BY DEVELOPMENT PARTNER, REPORT TITLE, LOCATION, DATES, AND ADDED TOOLS, 2011-2012

Partner	Locations	Dates	Supplementary Tools
UN Joint Programme on Youth Employment	Central Equatoria: Juba Town Jonglei: Bor Eastern Equatoria: Magwi, Abara	June 2011	Market Observations Form Community Leaders Protocol Retailer Qualitative Protocol Returnees Qualitative Protocol
UMCOR	N. Bahr el Ghazal: Gok Machar & Ariath	July 2011	none
UNHCR	Unity: Rupkona Lakes: Rumbek Warrap: Kwajok N. Bahr el Ghazal: Aweil Upper Nile: Malakal	August 2011	Questionnaire on Returnee Livelihoods Case Study Qualitative Protocol
Save the Children	N. Bahr el Ghazal: Wanjok & Maluakon	December 2011	Protocols based on Women’s Commission Toolkit for Vocational Training Assessments
IOM	W. Bahr el Ghazal: Wau	December 2011	Youth Qualitative Protocol, Government Qualitative Protocol Community Leaders Protocol
UNIDO	Upper Nile: Nasir, Ulang, Panyikang	May 2012	Returnees Qualitative Protocol
Canadian Red Cross	Eastern Equatoria: Budi	June 2012	n/a
Plan International	Central Equatoria: Lanya, Juba, Yei & Terekeka	June 2012	Youth Qualitative Protocol (FGD)
UNHCR	Western Equatoria: Yambio Eastern Equatoria: Torit	December 2012	Questionnaire on Returnee Livelihoods Case Study Qualitative Protocol

It is important to note that these market assessments represent an iterative process. As a result, data sets are not always comparable across all locations as additional questions, goods, services, and response options were added from the lessons learned in the previous rounds. The culmination of these alterations were combined to create *The Manual for Conducting Market Assessments: South Sudan* which is meant as an accompanying publications to this work.

The quantitative surveys administered utilised smartphones with Android operating systems and the programme *EpiSurveyor*. Developed in coordination with various health-related NGOs, *EpiSurveyor* facilitates and standardises data collection and analysis.

Combining all of these separate market assessments, a total of 1,512 people were interviewed utilizing the Consumer Demand Survey and 1,324 utilizing the Market Opportunity Survey. The following table details the sample size for the data informing this report:

TABLE 2: TOTAL SAMPLE SIZE BY SURVEY TYPE, ALL LOCATIONS

Partner/Location	Consumer Demand Sample	Market Opportunity Sample
UN Joint Programme on Youth Employment		
CEQ: Juba	182	239
JNG: Bor	30	102
EEQ: Magwi	30	32
EEQ: Abara	27	16
UMCOR		
NBEG: Gok Machar	71	64
NBEG: Ariath	58	44
UNHCR		
UNI: Rupkona	32	42
LAK: Rumbek	31	76
WAR: Kwajok	35	59
NBEG: Aweil	53	28
UNS: Malakal	71	37
Save the Children		
NBEG: Wanjok	63	41
NBEG: Malualkon	61	25
IOM		
WBEG: Wau	63	42
UNIDO		
UNS: Nasir	90	73
UNS: Ulang	83	63
UNS: Panyikang	117	67
Canadian Red Cross		
EEQ: Budi	64	36
Plan International		
CEQ: Lainnya	61	49
CEQ: Juba Rokon	61	48
CEQ: Yei	61	71
CEQ: Terekeka	69	31
UNHCR		
WEQ: Yambio	66	66
EEQ: Torit	33	33
TOTAL	1,512	1,324

Functionally, *EpiSurveyor* facilitates faster, more accurate research: data collectors enter respondents' answers directly into the phones, which automatically record the date, time, and GPS coordinates of the survey. This data is then immediately sent to a central computer, enabling staff to coordinate and refine data collection (and address any unforeseen problems) earlier in the research process. Skip patterns and numerical logic are also programmed into the survey, to ensure that each respondent only answers relevant questions. Data collectors are able to administer surveys quickly, as multiple-choice responses can be simply clicked and recorded, and paper surveys do not need to be carried around, filled out by hand by the data collector, and then submitted for data entry.

Data was transferred from *EPISurveyor* into Excel and then imported to STATA 9 or IBM-SPSS for analysis. A series of cross tabulations and logical regressions were performed to create applicable and useful insights from the raw data.

03/KEY FINDINGS

Data from these twenty four market assessments were compared in order to identify common themes across livelihoods zones and the greater areas. The following findings emerged:

7. Markets in South Sudan are extremely diverse and influenced by a number of factors including livelihoods, trade routes, border proximity, cost to market, and consumer purchasing power. High degrees of particularity mean effective programming should be tailored to the specific intervention areas.
8. Regardless of the training programme, location, or skill set, all vocational training and livelihoods programmes should be constantly preparing graduates to enter the marketplace. Helping trainees understand the market and equipping them with the necessary skills to approach the market (including soft skills) is crucial to ensuring the success of graduates. Linking programmes to ongoing support initiatives like village savings & loan associations is also strongly recommended.
9. Training in commonly recognized “urban” vocations must be evaluated for local applicability. Skills including plumbing, generator repair, vehicle maintenance, and computer repair may have only limited market potential in peri-urban settings surrounding Juba. Urban settings do offer their own unique opportunities, especially in areas such as construction, masonry, and cooling systems.
10. The demand for agricultural tools produced by welders and blacksmiths varies greatly in different regions of the country; Greater Equatoria is adequately supplied from Kenya and Uganda with moderate quality, low-price goods. Conversely, areas of Greater Bahr el Ghazal and Greater Upper Nile demonstrate high demand for locally produced agricultural tools and repair services, meaning employment potentials differ greatly by location.
11. There is a need for horticultural products in almost every market. Horticulture is a female-friendly occupation that increases dietary diversity in the household. In a similar fashion, fishing is a highly underexploited line of business. The value chains of both industries, including canning, food processing, agro-processing, and production of oils all possess significant market potential.
12. There is a need to redefine “traditional” female occupations in order to achieve greater gender parity in competitive and relevant vocations.

The following sections discuss each of these key findings in greater detail, drawing on data from the twenty-four market assessments.

3.1 / MARKETS IN SOUTH SUDAN ARE DIVERSE AND REQUIRE TAILORED PROGRAMMING

The most significant finding of this exercise was that no two markets in South Sudan are exactly the same. In fact, multiple markets were often found to exist concurrently in the same urban areas. To illustrate this, we have created Table 2 comparing customer satisfaction with tailoring services across select locations.

TABLE 3: CUSTOMER SATISFACTION WITH TAILORING SERVICES, SELECT LOCATIONS

Location	Dissatisfied		Satisfied		Non-Consumers	
	%	N=x	%	N=x	%	N=x
Aweil	73.30%	33	15.60%	7	11.10%	5
Kwajok	32.40%	12	10.80%	4	56.80%	21
Malakal	32.40%	23	36.60%	26	31.00%	22
Rumbek	40.00%	18	55.60%	25	4.40%	2
Rupkona (Bentiu)	65.60%	21	0%	0	34.40%	11
Nasir	82.20%	74	1.10%	1	16.70%	15
Bor	25.80%	8	54.80%	17	19.40%	6
Konyo Konyo (Juba)	65.20%	45	23.20%	16	11.60%	8

A cursory examination of the above table indicates that not only is their wide variation in consumer dissatisfaction, but also in consumption habits. In Kwajok, 32.4% (n=12) of respondents were dissatisfied with the quality of existing tailors and more than half of respondents (56.8%, n=21) did not utilize the services of tailors at all. Similarly, none of the respondents in Bentiu were satisfied with existing tailoring services and more than one third (34.4%, n=11) were not utilizing any such services. Conversely, in Rumbek high utilization of tailoring services were observed with only moderate satisfaction, while in Nasir high dissatisfaction rates do not prevent high utilization. Table X exemplifies that even basic skills like tailoring cannot be assumed to be universally applicable across South Sudan. Tailoring graduate success is largely predetermined according to the data above and dictated by local market conditions more than individual attributes.

A number of factors contribute to the viability of a particular skill. The influences exuded by livelihood zones, trade routes, border proximity, as well as availability of disposable income, all factor into the likelihood of a trainee successfully marketing their skill locally. Promoting training in unmarketable skills can have three negative consequences: (1) the creation of unutilized skill sets; (2) draining start-up tools/capital from the market place; and (3) rural-to-urban migration in search of job opportunities. The following sections discuss the impact and outcomes of each of these factors.

3.2/LIVELIHOODS AND PASTORALIST PRACTICES

One of the greatest challenges to animal husbandry as a source of income in South Sudan is the culturally sustained traditions of wealth associated with cattle ownership among certain Nilotic populations. People often fail to see livestock, dairy and poultry products as potential business opportunities except as emergency coping mechanisms or retaining produce for family consumption. As a result, customer dissatisfaction for livestock associated products remains high, despite the fact that the skills and resources are readily available. In addition, in areas where cattle-keeping is not as common of a cultural practice, the market demonstrates high dissatisfaction for livestock related products. This is particularly evident when looking at market demand for such products throughout the three greater regions. For this instance, we have selected Bentiu, Aweil and Lainya for comparison purposes across regions and livelihood zones.

TABLE 4: CONSUMER DISSATISFACTION WITH LIVESTOCK PRODUCTS BY REGION AND LOCATION TYPE, SELECT MARKETS

	Lainya, CEQ		Aweil, NBEG		Bentiu, UNI	
	%	N=x	%	N=x	%	N=x
Meat (goat or cow)	83.6%	51	70.2%	33	100.0	32
Fresh Milk	55.7%	34	23.4%	11	96.9	31
Butter	21.3%	13	56.5%	26	100.0	32
Yoghurt	21.3%	13	55.3%	26	96.9%	31

As the above table illustrates, in Bentiu the majority of consumers are dissatisfied with all livestock related products, despite availability. In Lainya, where cattle-keeping is less common, we see low levels of satisfaction *and* low levels of consumption, with the exception of meat. In Aweil, we see moderate dissatisfaction except in the availability of fresh milk, indicating that some businesses are exploring value chain addition. These variations indicate that particularly with “value add” livestock products, demand is high where the resources are available.

3.3/TRADE ROUTES & BORDER PROXIMITY

Trade routes between Sudan and South Sudan have been intermittent at best since independence in 2011. As a result, those states not linked directly with Uganda or Kenya have disproportionately suffered a lack of staple goods as this trade route has been shut off. As a result, proximity to trade routes greatly affects the market demand for locally produced goods and the market opportunity for specific trades. The following table demonstrates the difference in satisfaction for staple goods and services in three locations – Juba (primarily served by Kenya & Uganda), Malakal (previously served through Sudan) and Wau (previously served by Sudan, now served by Juba).

TABLE 5: SATISFACTION WITH STAPLE GOODS, SELECT MARKETS

	Juba (Konyo Konyo)		Malakal, UNS		Wau, WBEG	
	%	N=x	%	N=x	%	N=x
Oil	30.1	13	20.0	14	52.4	33
Flour	31.0	27	14.5	10	50.8	32
Local Metal Goods	31.0	27	1.4	1	47.6	30
Blacksmith	2.8	3	4.2%	3	15.9	10
Tailor	24.3	25	36.6	26	63.5	40

Finally, availability of income and consumer purchasing power heavily impacts the demand for various services within market. Data collected from Budi (poverty headcount 57%), versus Torit (poverty

headcount 39%) or Juba (poverty headcount 36%) indicate substantial variation in consumption rates for non-essential services.³² When juxtaposing the poverty rate with non-consumption and dissatisfaction among consumers, it becomes apparent that wealth plays a critical role in the use of services traditionally taught in vocational training programmes. Overall, consumption of services is low, with price being noted as a source of dissatisfaction. The below table indicates the consumption rate of some traditional vocational training skills in different areas to illustrate that in many cases, these services are not consumed in many areas, and even where they are, prices are considered to be very high in comparison to the purchasing power of the residents of the area.

TABLE 6: NON-CONSUMPTION AND PRICE DISSATISFACTION FOR VARIOUS SERVICES, SELECT LOCATIONS.

	Budi, EEQ		Torit, EEQ		Wau, WBEG	
	Non-Consumers	Dissatisfied: Price	Non-Consumers	Dissatisfied: Price	Non-Consumers	Dissatisfied: Price
Catering	34.4% (n=22)	29.6% (n=12)	83.9% (n=26)	3.2% (n=1)	55.6% (n=35)	1.6% (n=1)
Electrician	82.8% (n=53)	36.4% (n=4)	90.3% (n=28)	0.0% (n=0)	44.4% (n=28)	6.4% (n=4)
Mechanic	76.6% (n=49)	13.3% (n=2)	41.9% (n=13)	3.3% (n=1)	49.2% (n=31)	6.4% (n=4)
Beautician	60.9% (n=39)	24.0% (n=6)	70.8% (n=22)	12.9% (n=4)	54.0% (n=34)	12.7% (n=8)

3.4/GRADUATES NEED BETTER PREPARATION TO ENTER THE MARKETPLACE

Many vocational training and livelihoods skills programmes have the identify skills for training but fail to properly identify the end goal for their trainees. The required skills, support, and potential programming required in order to ensure success for graduates varies greatly depending on whether trainees are expected to become gainfully employed, remain self-employed or start their own businesses.

It is important to note as well that several skills are not suited for self-employment, and the capital and resources required to start such businesses far exceeds the capacity of project interventions.

Key to undertaking any vocational training programme is preparation for entering the marketplace; while trade-specific vocational skills are necessary to bring to the market, such training does not necessarily translate to business success. Trainees need to be provided with basic business skills such as financial literacy, numeracy, and language training, but also with the knowledge of proper attitudes and behavioural standards necessary to excel in the marketplace and the commitment necessary to succeed as an entrepreneur. It cannot be assumed that the school to work transition will be smooth, and a comprehensive understanding of the challenges of entrepreneurship coupled with the enthusiasm and

³² National Bureau of Statistics, South Sudan Poverty Estimates at the County Level for 2008. pg. 16.

attitude necessary to support a budding business is a necessary component to any vocational training programme.

One beneficial resource in the development of vocational skills programming that emphasises these complexities to succeeding in the marketplace is the ILO's Know About Business (KAB) Entrepreneurship Education Programme. Started in Kenya in the late 1980s, KAB seeks to promote awareness among young people of the opportunities and challenges associated with entrepreneurship through four specific objectives:

- Develop positive attitudes towards enterprises and self-employment among the population, by targeting youth but also stakeholders for enterprise development.
- Create awareness of enterprises and self-employment as a career option for young people in secondary and vocational education.
- Provide knowledge and practice of the desirable attributes for and challenges in starting and operating a successful enterprise.
- Facilitate the school-work transition as a result of a better understanding of functions and operations of enterprises.³³

The current KAB package provides entrepreneurs with background knowledge of the countrywide benefits to small business creation. Currently operational in 18 countries, KAB provides multiple methodologies for to development of enterprise culture within the vocational training setting.

Another key supplement for vocational training is the ILO's Start and Improve Your Business (SIYB) curricula. Implemented in 96 countries, SIYB has reached an estimated 4.5 million trainees with management training on starting and improving small business strategy for increased employment in developing and transitioning economies.³⁴ Through a consolidated and step-by-step approach to enabling potential and existing entrepreneurs, SIYB includes trainings on cooperatives, small enterprise development, multinational enterprise development, and a Green Jobs Programme.

All of SIYB programmes aim to increase the viability of small and medium enterprises through sound management principles designed for use in developing economies. By providing a framework to foster business ideas while helping identify personal characteristics beneficial to conducting business, SIYB provides practical assistance with the vital school to work transition.

3.5/SPECIALIZED TECHNICAL SERVICES & THE URBAN-RURAL DIVIDE

In addition to tailoring programmes to particular areas of intervention, it is important to note that many skills are not in demand outside of South Sudan's "urban" areas. This is best demonstrated by examining

³³ Know About Business. <http://kab.itcilo.org/en/what-is-kab/objective>.

³⁴ ILO. Start and Improve Your Business Programme.

non-consumption rates for various services. The following table details rates of reported non-consumption for select urban and rural locations.

TABLE 7: NON-CONSUMPTION RATES OF VARIOUS SERVICES, SELECT LOCATIONS

	Juba (Konyo Konyo)	Wau, WBEG	Malakal, UNS	Bor, JNG	Budi, EEQ	Malualkon, NBEG	Terekeka, CEQ
Plumbing	52.9% (n=36)	52.4% (n=33)	50.7% (n=56)	80.7% (n=25)	85.9% (n=55)	56.7% (n=38)	91.4% (n=64)
Generator Repair	44.1% (n=30)	33.3% (n=21)	NA	48.4% (n=15)	82.8% (n=53)	58.2% (n=39)	85.7% (n=6)
Electrician	41.2% (n=30)	44.4% (n=28)	53.5% (n=38)	67.7% (n=21)	82.8% (n=53)	55.2% (n=37)	82.9% (n=58)
Computer Repair	40.6% (n=28)	55.6% (n=35)	70.0% (n=49)	54.8% (n=17)	89.1% (n=57)	53.7% (n=36)	77.1% (n=54)
Appliance Repair	38.3% (n=26)	50.8% (n=17)	NA	76.7% (n=23)	76.6% (n=49)	55.2% (n=37)	87.1% (n=53)

While rates of non-consumption are relatively high for all of these noted service (if compared to boda-boda usage or fresh cut fruits) a rural-urban divide exists for services related to electricity—generators, electronics, etc.—and plumbing. For example when the rates on non-consumption of plumbing services from Juba’s Konyo Konyo market are compared to those in Terekeka, there is a clear disparity in usage (52.9% in Juba, versus 91.4% in Terekeka). The location of training programmes must be considered when providing vocational training, as services that require expensive set-up such as plumbing or the use of electricity will most likely not be used outside of “urban” areas. Training is rendered ineffective if there is a lack of consumers, and will most likely encourage rural-urban migration to satisfy one’s skillsets.

3.6/ AGRICULTURAL INPUTS: DEMAND FOR BLACKSMITHS & WELDERS

The need for increased agricultural production throughout South Sudan has led to an emphasis on improving the quality, availability and affordability of agricultural inputs – specifically tools -- in all markets. However, when considering the promotion of skill training for blacksmiths and welders, it is important to consider external factors influencing this particular market. This section explores the influence of border proximity, price, quality, and brand loyalty on the competitiveness of locally produced agricultural tools versus imports from neighboring Uganda and Kenya.

TABLE 8: CONSUMPTION RATES & SATISFACTION FOR AGRICULTURAL RELATED TOOLS AND SERVICES, SELECT LOCATIONS

	Lainya, CEQ	Budi, EEQ	Wanjok, NBEG	Malakal, NBEG
Consumer of Agricultural Tools	81.7% (n=49)	67.1% (n=43)	73.0% (n=46)	63.4% (n=45)
Dissatisfied	79.6% (n=39)	55.8% (n=25)	56.5% (n=26)	46.4% (n=32)
Unavailable	12.8% (n=5)	18.6% (n=8)	8.7% (n=4)	15.6% (n=5)
Price	82.1% (n=32)	14.0% (n=6)	30.4% (n=14)	68.8% (n=22)
Quality	2.6% (n=1)	20.9% (n=9)	8.7% (n=4)	9.4% (n=3)
Blacksmith (Dissatisfied)	n/a ³⁵	72.0% (n=18)	92.6% (n=25)	29.6% (n=21)

CASE STUDY: PROMOTING TRADE OVER TRAINING IN CENTRAL EQUATORIA

In March 2010, Forcier Consulting conducted a specialized market assessment on agricultural tools in Yei, Central Equatoria State for the United Methodist Committee on Relief. Data from the study indicated that although there was opportunity for local production of agricultural tools, low prices, brand loyalty, and the duration of training required may pose a problem for new blacksmiths entering the market.

The main source of competition for local blacksmiths in Yei in early 2010 derived from the agricultural tools being imported from Uganda—specifically, the *Cock* and *Crocodile* brands. The *Cock* and *Crocodile* were being imported by Ugandan or Southern Sudanese traders and sold in Yei Town, as well as in other cities in the region. Traders reported that customs duties in March 2010 at the Southern Sudanese/Ugandan border were approximately USD 50.

Retailers in Yei Town offered most basic agricultural tools, though most, and in some cases all, of these tools were imported (93.9%, n=14, of hoes, 100.0%, n=7, of axes, 100.0%, n=16 of machetes, 100.0% n=12 of wheelbarrows, and 93.9% n=14 of knives). While roughly half of consumers expressed satisfaction (52.79%) in Mugwo Payam and 48.44% in Kenyi Payam with the *cock* and *crocodile* brands that were being imported from Uganda, retailers report frequent complaints of quality and price with these products. For hoes, the most common agricultural tool, 93.3% (n=14) of retailers said that customers were dissatisfied with the quality of these products and 100.0% (n=15) said that customers were dissatisfied with the price. Continuing with hoes, 33.3% (n=5) of retailers selling them said they “almost always” had trouble meeting consumer demand for these items. Given that hoes are cited as a tool in cultivation by close to 100% of farming households, it appeared to be a clear opportunity for either (1) current retailers to expand their stock, or (2) new retailers to begin business. While the natural inclination may have been to promote blacksmith training, qualitative data indicated that the amount of time required to adequately train blacksmiths to produce the tools in demand in the market was more than one year, at which point, the market demand may have changed post-independence.

Despite the current unmet demand for agricultural tools (with general satisfaction rates of only 52.8% in Mugwo Payam and 48.4% in Kenyi Payam), both (1) the high costs associated with the manual production of agricultural tools, and (2) projected increases in the competition with imported tools in the years post-independence, suggested that the costs associated with the manual production of agricultural tools could exceed profit margins for local blacksmiths. Thus, we recommended discontinuing the planned training of blacksmiths, in favor of a program that would provide capital and support to local retailers and allow them to import sufficient quantities of agricultural tools to meet consumer demand.

³⁵ All respondents indicated they had never used the services of a blacksmith

3.7/HORTICULTURE & FISHING POTENTIAL

In all locations throughout the country, there was clear consumer demand and market opportunity for fruits, vegetables, and related goods. The following table illustrates demand in select locations.

TABLE 9: RATES OF DISSATISFACTION WITH VARIOUS FRUIT AND VEGETABLE PRODUCTS, SELECT MARKETS

	Juba (Konyo Konyo)	Magwi, EEQ	Bor, JNG	Nasir, UNS	Wau, WBEG	Wanjok, NBEG
Vegetables	39.3% (n=35)	3.2% (n=1)	51.6% (n=16)	92.2% (n=73)	23.8% (n=15)	31.6% (n=20)
Fruits		77.4% (n=24)		70.0% (n=63)	31.7% (n=20)	23.8% (n=15)
Juice	37.9% (n=33)	61.3% (n=19)	n/a	82.2% (n=74)	33.3% (n=21)	39.7% (n=35)
Cut Vegetables	66.1% (n=74)	56.7% (n=17)	45.2% (n=14)	16.7% (n=15)	50.8% (n=32)	12.7% (n=8)

The inclusion of vegetables in the household diet will improve food consumption scores and dietary diversity. Studies in other countries have indicated that dietary diversity scores are directly linked to the production and trade in vegetables.³⁶

Qualitative data also indicated that in markets where vegetables were being sold, this was an activity primarily undertaken by women. As was explained in the previous section, there is a clear need for *relevant* female-friendly skills and horticulture is a potential “silver bullet” for creating self-employment for women throughout South Sudan.

Fish is commonly found in markets throughout South Sudan in three forms: dried small fish, dried large fish, and fresh fish. Particularly in the Equatorias, dried small fish is imported from Uganda, despite the relative ease of producing the product locally. In Budi and Torit, Eastern Equatoria, consumers listed fish as an item that they would travel to other markets in order to purchase due to local unavailability. The same was indicated in Lainya and Rokon in Central Equatoria.

³⁶ See Keding, G., J. Msuya, B. Maas, M. Krawinkel. “Relating dietary diversity and food variety scores to vegetable production and socio-economic status of women in Rural Tanzania.” *Food Security* 4:1, pp 129-140.

TABLE 10: CONSUMPTION RATES & SATISFACTION WITH FISH PRODUCTS, SELECT MARKETS

	Rumbek, LAK	Malakal, UNS
Fresh Fish: Consumers	41.9% (n=13)	78.6% (n=55)
Fresh Fish: Dissatisfied – Price	54.8% (n=17)	37.1% (n=26)
Imported fresh fish: Consumers	87.1% (n=27)	56.3% (n=40)
Imported Fresh Fish: Dissatisfied – Price	100.0% (n=27)	26.8% (n=19)
Local Processed Fish: Consumers	90.3% (n=28)	74.6% (n=53)
Local Processed Fish: Dissatisfied – Price	45.2% (n=14)	40.9% (n=29)
Imported Processed Fish: Consumer	87.1% (n=27)	37.1% (n=26)
Imported Processed Fish: Dissatisfied - Price	80.7% (n=25)	12.9% (n=9)

Fishing activities, whether for personal consumption or market sale, has a positive effect on household food consumption scores. A study conducted for UMCOR in Yei and Lainya counties demonstrated that such activities could result in households being as much as *three times more likely* to have an acceptable food consumption score than their non-fishing counterparts.

3.8/GENDER CONSIDERATIONS & “TRADITIONAL” FEMALE OCCUPATIONS

Gender parity in programming is a primary concern for many organizations seeking to implement vocational & livelihoods training programmes. However, data from market assessments across South Sudan demonstrate that “traditional” female-friendly training occupations have some of the lowest rates of consumption and demand. As a result, while women are receiving training in centres throughout the country, their success is naturally compromised due to type of training received. As a result, programmes will inadvertently have higher success rates among male graduates than females. The following table shows the rates of dissatisfaction of various “female-friendly” trades by region to illustrate the lack of market demand for these skills.

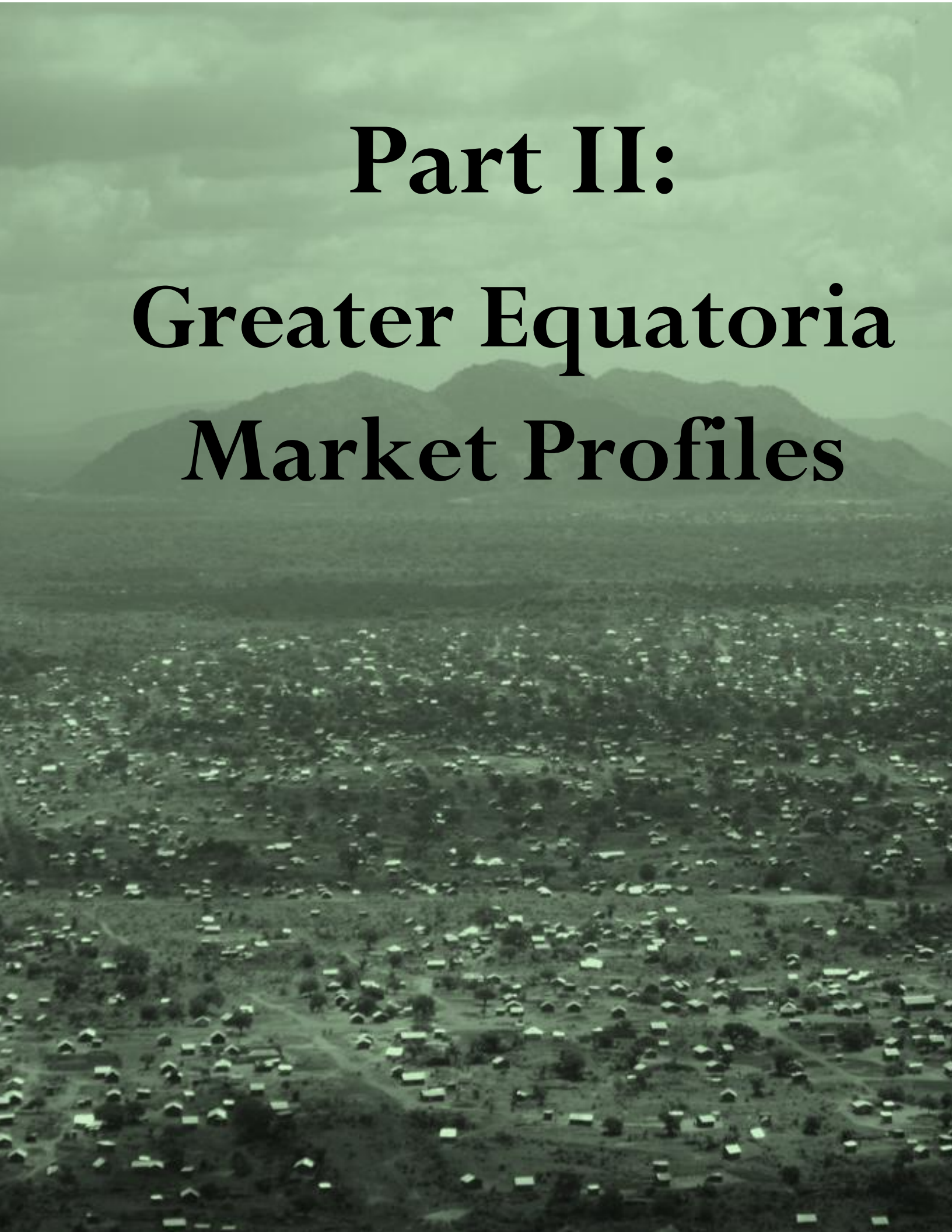
TABLE 11: DISSATISFACTION WITH VARIOUS TRADES, SELECT MARKETS

	Budi, EEQ	Torit, EEQ	Wau, WBEG	Malakal, UNS	Malualkon, NBEG
Tailoring	39.1% (n=25)	22.6% (n=7)	34.9% (n=22)	32.4% (n=23)	46.7% (n=14)
Beautician	31.3% (n=20)	12.9% (n=4)	19.0% (n=12)	n/a	73.3% (n=22)
Computer	7.8% (n=5)	19.4% (n=6)	34.9% (n=22)	22.5% (n=16)	6.7% (n=2)

04/CONCLUSIONS & RECOMMENDATIONS

In reviewing the twenty-four skills and market opportunity surveys some common skills gaps, and market and consumer patterns emerged. These trends provide insights to better match education and vocational training to labour market needs, as well as the potential for new markets and market growth. The aggregate analysis permits the following conclusions and recommendations to be drawn.

- Goods are bought by a far larger section of the populace than services are utilized. Therefore, **local production of goods** is in general in higher demand than service provision. This should be taken into account when providing vocational and skills training, as often it focuses on the latter rather than the former.
- Increased agricultural output should be a top priority, as currently the majority of produce is imported and consumers are dissatisfied due to price and shortages. Programmes should focus on **teaching people how to grow vegetables**, as well as general farming practices such as row planting and irrigation techniques.
- **Processing groundnuts, sesame and shea nuts to produce oil** should also be investigated, as this is a relatively low-tech process which will open up a new market and add value to a familiar crop.
- **Highly skilled services such as plumbing and electricians are not in high demand** due to the scarcity of people who have access to indoor plumbing and electricity. Services such as general appliance repair are more relevant to the needs of larger urban labour markets.
- **Most people prefer to buy imported secondhand clothes from Uganda and Kenya rather than use local tailors** for the majority of their clothing, therefore tailoring is not a service area with large potential for growth.
- **People often fail to see livestock, dairy and poultry products as a potential business opportunities**, instead keeping produce for their own consumption. Training on using livestock and poultry to produce a range of products for the market should be given greater attention.
- **Catering is the most-used service**, and has high levels of dissatisfaction for reasons ranging from price to hygiene and packaging. Catering training, both for restaurants and for local street foods such as rolexes, mandazi and thamia should therefore be a key area of focus.
- **Basic literacy and numeracy and business and financial skills should be incorporated into all vocational and skills training programmes**, as many people lack both education and business knowledge and therefore find it difficult to fully succeed in business.
- **In many areas language barriers make it difficult for people to find work and or grow their businesses.** English lessons should therefore be offered in conjunction with vocational and skills training program

An aerial photograph of a vast, densely populated settlement, likely a city or large town, stretching across a wide valley. The buildings are small and numerous, interspersed with trees. In the background, a range of mountains is visible under a cloudy sky. The entire image has a monochromatic green tint.

Part II:
Greater Equatoria
Market Profiles

<u>Central Equatoria</u>	<u>Eastern Equatoria</u>	<u>Western Equatoria</u>
Juba	Magwi	
Terekeka	Abara	Yambio
Lainya	Budi	
Yei	Torit	

01 / CENTRAL EQUATORIA

Forcier Consulting conducted three main assessments in Central Equatoria. The *Youth Skills Profile and Rapid Market Assessment* was conducted for Plan International in Lainya, Juba, Yei, and Terekeka Counties. The *Youth Skills and Market and Market Opportunities Baseline Assessment*, conducted for the MDGF UN Joint Programme on Youth Employment, was conducted across three states; in Central Equatoria, only Juba Town was represented. The findings contrast to Plan's Juba locations because those were in rural areas of Juba County. MGDF's assessments were also carried out in Bor, Jonglei, and Magwi and Abara in Eastern Equatoria. Finally, UMCOR sponsored a third assessment in Lainya County specifically on the need for agricultural tools in the county.

1.1 / INTRODUCTION TO ASSESSED AREAS

Central Equatoria is the second most populous state in South Sudan, with an estimate population of 1,103,557 and an area of 43,033 km².³⁷ It is located in the South of the country, and borders Uganda and DRC. The country capital, Juba, is located in the centre of the state, and the Nile runs through it. Central Equatoria has not recently experienced significant inter-tribal violence, though it was heavily bombarded during the civil war. Central Equatoria has the second-highest literacy rate in South Sudan, at 56%,³⁸ and in 2009 there were 15,880 people enrolled in secondary school.³⁹

JUBA

Juba is the state capital of Central Equatoria, as well as the capital of South Sudan, with a population of around 82,300.⁴⁰ Juba serves as a regional centre of trade in South Sudan, with people travelling from rural areas to gain access to a greater variety of goods and services.

Both in anticipation of and after separation from the North on July 9th 2011, return migration to South Sudan has dramatically increased, with around a quarter of a million people estimated as having returned.⁴¹ As the country's capital, Juba is one of the main destinations for returnees, as well as providing a transit point for people returning to their home communities in other areas.⁴² Juba County

³⁷ SOUTHERN SUDAN CENTRE FOR CENSUS, STATISTICS & EVALUATION, 2010. Statistical Yearbook for Southern Sudan, p.14

³⁸ Ibid. p. 48

³⁹ Ibid. p. 51

⁴⁰ Ibid. p.8

⁴¹ CHF International 2011, *South Sudan: Returnee and Host Community Assessment Report. Morobo, Juba and Torit Counties*. February 2011, p. 1. [07.21.2011]

⁴² Ibid, p. 3.

itself has 5,069 returnees.⁴³ The influx of people has resulted in a higher demand for goods and services.⁴⁴ As a result, imports from neighbouring countries, especially Uganda, have increased significantly.⁴⁵ This has driven up prices and consequently reduced food security for the population as a whole. Around 50% of households engage in farming, and USAID’s Famine Early Warning System considers the food security situation in Juba itself to be at no/minimal risk—although the north of the county is considered “stressed.”⁴⁶

Juba is historically dominated by the Bari tribe; however, the ethnicity of the population has diversified greatly over time, incorporating people from all over South Sudan and surrounding countries such as Uganda, Kenya and Eritrea. The continued involvement of NGOs and the UN in South Sudan and the new status of Juba as a capital city with international embassies also means there are many people from outside the African continent who live and work in Juba. The relative wealth of this population makes it a significant aspect of the market.

Three markets were assessed in Juba County, two within Juba City itself (Gudele and Konyo Konyo), and one in the more rural payam of Rokon.

TEREKEKA

Terekeka County is located in the north of Central Equatoria state, approximately one hour driving from Juba. It is the second-largest county after Juba in the state both in terms of area (10,538.23km.) and population (144,373).⁴⁷ Although there is a well-maintained road connecting Juba to Terekeka, the roads that lead into the payams are of poor quality, becoming impassable during the rainy season. The tribal composition of Terekeka County is mainly Mundari, and the majority of the populace live off subsistence agriculture and livestock. The market assessment occurred within Terekeka itself, the county capital.

LAINYA

Lainya County consists of fifteen bomas in five payams and enjoys a wealth of natural resources including bamboo, mahogany, gold, sand, copper, stones and limestone. Although the climate displays slight variations from year to year, the region typically experiences a wet season spanning from April to October and dry season between October and March. The population of Lainya County is 89,315, and it has an area of roughly 3,446.48 km².⁴⁸

Community members describe a large number of returnees reintegrating into the district after extended periods overseas in locations such as Khartoum and Uganda. As the majority say they were offered no support upon their return, many returnees have engaged in small-scale business such as cultivation, charcoal production, and selling bamboo.

⁴³ Ibid, p. 4

⁴⁴ Ibid, p. 5.

⁴⁵ Yutaka Yoshino, Grace Ngungi and Ephrem Asebe, *Africa Trade Policy Notes: Enhancing the Recent Growth of Cross-Border Trade Between South Sudan and Uganda*. World Bank, Policy Note No. 21, July 2011.

⁴⁶ FEWSNET 2012.

⁴⁷ Statistical Yearbook for Southern Sudan 2010:14

⁴⁸ Statistical Yearbook of South Sudan 2010, p.14

YEI

Yei County is located in the south of Central Equatoria state, near the borders with Uganda and DRC. It has an estimated population of 201,443, and an area of 6,667.76 km². It has a relatively cool and wet climate, and thus production of foodstuffs, especially fruit, is higher than in many other areas of South Sudan. Due to its proximity with Uganda, there are many immigrants from this and other neighbouring countries in the area, as well as a significant population of returnees. Despite not being a state capital, Yei is one of the best-developed towns in South Sudan, largely due to its previous location on one of the main trade routes. The opening of a new paved highway through Nimule has to some extent lessened this advantage, as the trade route has shifted.

1.2/SELECTED FINDINGS AND ANALYSES

TABLE 12: GOODS WITH HIGHEST DISATISFACTION BY LOCATION, 2011-2012

Juba County: Rokon and Lirya	Lainya	Terekeka	Yei	Gudule Market, Juba	Konyo-Konyo Market, Juba
Fresh Milk 67.2% (n=41) (supply)	Imported Vegetables 88.5% (n=54) (expense)	Charcoal 47.1% (n=33) (expense)	Imported Clothes 98.4% (n=60)	Pharmaceuticals 98.4% (n=126)	Live Animals 66.7% (n=58) (expense)
Imported Grains 65.6% (n=40) (supply)	Oil 86.0% (n=53) (expense)	Imported Fruit 42.9% (n=30) (supply)	Second Hand Clothes 95.1% (n=58)	Oil 89.9% (n=116)	Charcoal 62.9% (n=56)
Local Vegetables 59.0% (n=36) (supply)	Meat (Goat/Cow) 83.6% (n=51)	Flour 41.4% (n=29) (expense)	Imported Vegetables /Flour 93.5% (n=57)	Charcoal 89.2% (n=115)	Pharmaceuticals /Oil 56.7% (n=51)
Eggs 59.0% (n=36) (supply)	Flour/Imported Grains/Imported Fruit tied: 80.3% (n=49)	Meat (goat/cow) 38.6% (n=27) (expense)	Imported Fruit/Meat Cow tied: 90.1% (n=55)	Dairy 83.7% (n=108) (expense)	Chicken and Chips 57.5% (n=50) (expense)
Powdered Milk 59.0% (n=36) (expense)	(i. Fruit: expense Flour: expense i. grains: expense)	Imported Grains/Nuts/Brea d 35.7% (n=25)		Kitchen Supplies 83.6% (n=107)	

In three of the five locations, respondents expressed dissatisfaction with the same five goods, including charcoal, imported grains, imported fruit, oil and cow/goat meat. In addition, in one further location respondents expressed dissatisfaction with the supply of live animals, which are utilized primarily for meat, and therefore considered market related.

Charcoal is a relatively easy product to create, however the growth of this sector should not be overly encouraged as it could potentially lead to deforestation, a continuing problem in South Sudan.⁴⁹

⁴⁹ Relief Web, 2012.

The prevalence of dissatisfaction with imported produce (grains, vegetables and fruit) highlights the need both for improved transportation systems and increased local production of these products. The high dissatisfaction rates with the price and prevalence of imported agricultural products could be alleviated through increased local production. This could substantially reduce prices, as the high cost of transport into South Sudan would be eliminated. Similarly, the production of local livestock for slaughter and/or direct sale should be encouraged, given the high rates of dissatisfaction with meat.

The local production of oil involves a higher degree of processing before sale, however there are several local options for its production. Particularly in Yei and Lainya counties (although to a certain extent across South Sudan), groundnuts and sesame are a commonly grown crops,. Both of these can be used to produce oil through cold pressing—a technique that could be made into a viable business with the aid of either livestock or machinery to power the grinding process. Additionally in Terekeka County, it was observed that Shea trees grow wild in rural areas, and population currently uses the fruit to eat and to produce oil from the seeds. This is done through a traditional technique of drying the seeds once the fruit has been eaten and then boiling them, upon which the oil floats to the top. Although this oil is held in high consideration locally, its potential as a product has not been fully exploited.

Geography and urban versus rural settings did not severely affect these trends in Central Equatoria, as much as they might in states with less reliable transport systems. A lack of supply also indicates an untapped demand for such goods, which compares to other goods and locations where “expense” is often the driving factor in dissatisfaction.

The main reason for dissatisfaction for goods in Central Equatoria was expense. In the more rural areas of Juba County, a lack of supply was a driving factor.

TABLE 13: SERVICES WITH HIGHEST DISSATISFACTION BY LOCATION, 2011-2012

Juba County: Rokon and Lyria	Lainya	Terekeka	Yei	Gudule Market, Juba	Konyo-Konyo Market, Juba
Boda Bodas 55.7% (n=34)	Hiace 83.6% (n=51)	Cut Fruit and Vegetables 40.0% (n=28) (too few vendors)	Hiace n=46 (75.3%)	Restaurant 72.1% (n=80) (poor hygiene)	Tailor 65.2% (n=45)
Dobbi 45.9% (n=28) (not enough)	Boda Bodas 67.2% (n=41)	Rolex 30.0% (n=21) (too few vendors)	Restaurant 68.8% (n=42)	Cut Fruit/Vegetables 66.1% (n=74) (supply)	Restaurant 63.8% (n=44) (expense)
Rolex 42.6% (n=26) (not enough)	Restaurant 57.4% (n=35) (expense)	Beautician 27.1% (n=19)	Boda Bodas /Teashops 59.0% (n=36)	Caterer 63.9% (n=69)	Boda Boda 58.0% (n=40) (Expense/ safety)
Water Collector 39.3% (n=24)	Teashop 52.4% (n=32) (expense)	Barber 25.7% (n=18)		Tailor 65.1% (n=67)	Appliance Repair (expense)/ Computer Repair 53.6 (n=37) (expense)
Hiaces 37.7%, (n=23)	Appliance Repair 50.8% (n=31)	Caterer/Construct ion/Computer Technician 21.4% (n=15)	Appliance Repair/Rolex tied: 45.9% (n=28)	Appliance Repair 58.0% (n=65)	

The most commonly identified services in which participants noted the most dissatisfaction in Central Equatoria include restaurants, appliance repair, boda bodas (motorbikes), and hiaces (vans), as identified in four of the five locations.

Such a high level of overlap between locations suggests that there is a great deal of similarity in demand for services across the state. The main reason for this dissatisfaction is not so much *supply*—as was common among goods—but the high expenses associated with the service of buying prepared and cooked food for immediate consumption. The fact that two of the services with the highest rates of dissatisfaction are transport-related suggests that this is a pressing issue, which may position it as a potential training field. Appliance repair and catering are also easily trainable skills, and should be focused on across the state.

TABLE 14: LEAST CONSUMED GOODS BY LOCATION, 2011-2012

Juba County: Rokon and Lyria	Lainya	Terekeka	Yei	Gudule Market, Juba	Konyo-Konyo Market, Juba
Yoghurt 70.5% (n=43)	Yoghurt 73.8% (n=45)	Tools / Wood Products 91.4% (n=64)	Prepared Food 85.2% (n=52)	Machinery 55.9% (n=71)	Tools 70.1% (n=61)
	Butter 68.9% (n=42)		Local Metal Goods 73.8% (n=45)	Bicycles 46.1% (n=59)	Bicycles 67.4% (n=60)
Accessories UHT Packet Milk	Accessories 57.4% (n=35)	Local Clothes /Local Metal Goods 85.7 (n=60)	Yoghurt 72.1% (n=44)	Spare Parts /Tools 45.0% (n=58)	Imported Crafts 62.9% (n=56)
Local Metal Goods Toiletries	Local Clothes 44.3%, (n=27)	Straw Products/Powde red Milk/UHT Packet Milk 84.3% (n=59)	Sewing Cloth 67.2% (n=41)		Local Alcohol 62.1% (n=54)
	Packaged Juice 29.5% (n=18)		Spare Pants 65.6% (n=40)	Imported Crafts 37.3% (n=44)	Straw Products 60.9% (n=53)

Trends were harder to discern for which goods were least consumed on a consistent basis throughout Central Equatoria State. Urban and rural differences were more apparent; for example, bicycles were not commonly used in urban settings likely due to the multitude of transport options available—even if satisfaction is low. Alternatively, yoghurt is particularly under-consumed in the rural areas. This is most likely because of lack of refrigeration and supply chain inefficiencies (which would necessitate refrigerated vehicles in accessing smaller scale rural payams). Along similar lines, local metal goods were not consumed often when compared to other items; especially in the rural areas.

TABLE 15: LEAST CONSUMED SERVICES BY LOCATION, 2011-2012

Juba County: Rokon and Lyria	Lainya	Terekeka	Yei	Gudule Market, Juba	Konyo-Konyo Market, Juba
Plumber 85.2% (n=52)	Plumber/ Blacksmith 98.4% (n=60)	Plumber 91.4% (n=64)	Plumber 100.0% (n=61)	Driver 72.0% (n=77)	Diary 72.5% (n=52)
Blacksmith /Beautician 83.6% (n=51)	Generator Repair 96.7% (n=59)	Gravel Collector 88.6% (n=62)	Milk from Dairy 98.4% (n=60)	Security 65.3% (n=73)	Cook / Driver 65.2% (n=45)
Photographer 80.3% (n=49)	Computer Technician 95.15 (n=58)	Milk from Dairy/ Mechanic/ Dobbi/Appliance Repair 87.1% (n=61)	Blacksmith / Caterer 93.4% (n=57)	Plumber 64.6% (n=71)	Housekeeper 63.7% (n=44)
Computer Technician 78.7% (n=48)	Electrician 93.4% (n=57)		Computer technician/Gener ator repair 91.8% (n=56)	Cook 63.6% (n=70)	Photographer 61.8% (n=42)
				Dairy 59.4% (n=63)	

Plumbers are seemingly never utilised—most likely because of the lack of plumbing, especially in rural areas. Blacksmiths are also not often contracted. The UMCOR study conducted in Yei found that though there is a lack in supply of blacksmiths and consequently metal tools, the best approach to fill this market void is to improve and develop the supply chain of tools from Uganda—which are comparatively quite cheap—instead of investing in vocational blacksmith training. (This is not the case for all of South Sudan; for example, this recommendation is reversed for Bor, Jonglei and parts of Northern Bahr el Ghazal). Finally, computer and generator repairers are simply not requested in the rural areas, and even in more urban areas are only utilized by the upper classes.

1.3/ CENTRAL EQUATORIA CONCLUSIONS & RECOMMENDATIONS

As one of the more deeply studied states in terms of market assessments, more can be deducted about the consistency of market characteristics throughout Central Equatoria when juxtaposed to with location specific research. On the whole, respondents are overly dissatisfied with imported foodstuffs, including grains, fruit, and vegetables, with oil, (fresh) dairy, and charcoal also receiving high dissatisfaction rankings.

In terms of goods that are least often consumed, yoghurt is a recurring under-consumed good throughout the whole of South Sudan.

Juba represents one of the more culturally diverse markets in South Sudan, necessitating language training for businesspeople. Appropriate communication and behavioural attitudes for a work context will help local business adapt to this unique environment.

According to the UMCOR surveys, the lack of agriculture tools in Yei and Lainya poses the biggest obstacle to increasing the viability of agribusiness, but that the best way to lessen the impact of this

challenge involves bolstering the supply chain from manufacturers in Uganda instead of investing in and training blacksmiths locally.

In Juba, the assessment of two separate markets, Konyo Konyo and Gudule, discovered that while very few goods are produced in Juba, a wide variety of goods does exist. A market opportunity was identified in the provision of non-street food. Restaurants currently meet this demand, but there are high levels of dissatisfaction with these existing institutions due to high prices and lack of cleanliness.

For all locations, the following recommendations are made

- Explore which vegetables are imported versus grown locally, and start schemes for schools to grow identified produce in their gardens. The higher price imported vegetables will fetch in the market provides a good financial incentive for schools, and new skills will be an attractive draw for parents.⁵⁰
- Supply chain interruptions with non-perishable goods can be overcome, and business owners should be educated on purchasing in bulk and forecasting demand.
- Production of local goods like chicken and vegetables, especially by young people, will fill a gap in the market and drive down prices.
- Because a prominent dissatisfaction is lack of supply, procedures that allow for increased output in certain sectors would help positively impact levels in all sectors. Opportunities to raise capital and agriculture production come particularly recommended.
- Agriculture training can increase supply of milk, vegetables, grains, flour, and eggs—all goods that commonly receive high rates of dissatisfaction. Further, provisions should be made to provide horticulture training for youth in the payams.
- Link with already existing youth groups in the area to enhance local organizational capacity.
- For other types of goods procurement, increasing capital by business loans would help offset the lack of supply; the need for training is not necessarily the only barrier. Providing business loans to small-scale enterprises could help close capital funding gaps that small business face, often because of responsibilities to dependents.

Several local specific recommendations can also be made. These are discussed in the following sections.

JUBA

- Relatively cheap catering-based services in the market present a potential area for training due to a large customer base. A further unrealized focus area involves the production and provision of local vegetables—which there are generally considered insufficient supply. This provides a training opportunity to both improve family nutrition and encourage entrepreneurship through simple skills.
- Lirya's market suffers from a lack of basic commodities, with much of the shortfall being

⁵⁰ ZOA is currently undertaking similar measures in Lainya.

covered by NGOs. However, it is likely that a large portion of these supplies could be made available and foster market expansion if the community were properly trained in activities such as crop production and the saving of seeds.

YEI

- Encourage communities to increase the number of animals kept for meat, such as goats, instead of relying on bush meat. This can improve the nutrition of households, and be a useful and regular source of income for families.
- Train people in beekeeping, paying particular focus to the ways in which women can create beehives without using the highly labour-intensive methods traditionally used to construct hives
- In Mugwo payam, assistance should be provided to the community to build shelters around the shallow wells they currently use for water. If funds allow, boreholes should eventually be drilled.

LAINYA

- Form groups for young women that can incorporate a variety of actions and trainings, including microsavings, literacy, numeracy, and business skills. By combining several activities into a group setting, stronger links will form and the possibility of developing a cooperative that protects future employment from shocks can come to fruition.
- There is a high demand for oil in the market, and local production methods should be explored. Training people to produce oil from groundnuts or sesame seeds, which are already grown in the area, can possibly provide a new form of income. High demand also exists for flour, and similarly the provision of grinding mills would enable the production.
- Trainings in catering services such as restaurants and teashops, and in the keeping of livestock for business purposes rather than merely for own use have the potential to prove useful. A large market for goat meat exists, and this would be a relatively easy skill that can encourage people to develop their own business.
- Due to the proximity to other countries and the multiplicity of local languages, learning a lingua franca becomes a crucial factor in the creation of opportunity. Language training courses in English and Juba Arabic should therefore be offered.
- Work to build the capacity of the county departments to reach the payams, including mobilizing the community to help improve the quality of roads reaching their villages. The disconnect between towns and remote villages greatly affects local economic development and social services.
- Discontinue training blacksmiths; educate retailers on importing enough tools to meet consumer demand. Retailers could be more able to meet demand than the costly and time-consuming process of training new blacksmiths.

TEREKEKA

- Explore ways in which transport between Rijong payam and Terekeka can be improved. One

option might be to form a cooperative or economic association of local youth who can band together to make an arrangement with a local driver to provide transport on a weekly basis during the rainy season so they can sell produce.

- Provide training on poultry-keeping and maximising the amount of eggs laid in order to combat the observed incidence of kwashiorkor in children.
- Mobilise local farmers into cooperatives or economic associations that can group together to export their goods to other areas, thereby bringing cash into Terekeka county.
- Train women on catering, particularly street foods such as Rolexes.⁵¹
- Explore ways in which shea nuts can be used to produce oil for a viable small-scale business enterprise.
- Capitalise on the location of Terekeka on a main transport route, and encourage people to sell to truck drivers, soldiers, and other people travelling through the area as well as the local populace, as these people are more likely to have disposable income for consumption of food, etc.

⁵¹ Rolex (rolexes) are fried eggs often with some tomato, onion, and salt, rolled in a chappati (typically consumed for breakfast). Originally from “Rolled Eggs.”

02/EASTERN EQUATORIA

Forcier Consulting conducted two assessments in Eastern Equatoria, one for the Canadian Red Cross in and around Chukudum (Budi County), titled *Food Security and Baseline Assessment*. The other assessment was conducted for MGFDF Youth Employment Programme in Magwi and Abara payams (in addition to other areas not in Eastern Equatoria), called *Youth Skills and Market Opportunities Baseline Assessment*. A third assessment conducted for UNHCR called, *Market and Livelihoods Assessment for Returnees*, looked at Torit, Eastern Equatoria, and Yambio, Western Equatoria. The previously mentioned assessment of Torit will be included in this analysis of Eastern Equatoria.

2.1/INTRODUCTION TO ASSESSED AREAS

Eastern Equatoria State has a population of approximately 900,000 (11% of the total population of South Sudan) with an area of 73,472 km² that borders Uganda, Kenya, Ethiopia, and Central Equatoria and Jonglei States.⁵² Eastern Equatoria has been riddled with violence due in part to its strategic and logistical location bordering Uganda and Kenya; it hosted the Lord's Resistance Army (LRA) until 2006 and the SPLA was based there from 1990 to 2001.⁵³ The state continues to be volatile and conflict-prone today due to the proliferation of small arms,^{54,55} although the rate of conflict incidences decreased to approximately 5% of the nation in 2010.⁵⁶ Like a number of states in South Sudan, cattle raiding is a key cause of cyclical violence.⁵⁷

The hot and arid areas of the state make it prone to food insecurity, especially during droughts.⁵⁸ The 2010 Annual Health and Livelihoods Assessment estimates that 72% of households in the state were affected by the food crisis caused by a shortage of rain in 2009 and 2010, especially towards the south-eastern part of the state (30% with severe food insecurity, and 42% with moderate food insecurity).^{59,60} The overreliance on cattle as both food and currency is problematic during periods of limited resources.

The predominant tribes and ethnic groups that live in Eastern Equatoria include the Acholi, Topossa, Dongotono, Imatong, Lokuta, Madi, Ofiriha, and the Pari,⁶¹ signifying a diversity that is also reflected in the five climate zones or geographical regions in the area (Arid/Pastoral, Hills and Mountains, Greenbelt, Eastern Flood Plains and Ironstone Plateau).⁶² The average rainfall ranges from 200 mm to 1800 mm per year,^{63,64} and as such, agricultural practices vary depending on annual rainfall: towards the

⁵² Key Indicators for Eastern Equatoria, 1 (ssnbs.org/storage/key-indicators-for.../Key%20Indicators_93.pdf)

⁵³ Eastern Equatoria State Profile, 1 (unmis.unmissions.org/Portals/UNMIS/.../Eastern%20Equatoria.pdf)

⁵⁴ Ibid.

⁵⁵ Eastern Equatoria County Consultation Summary (ss.undp.org/Documents/CSAC%20Reports/EES-Summary-Report.pdf)

⁵⁶ South Sudan Consolidated Appeal, OCHA, 18 (docs.unocha.org/sites/dms/CAP/CAP_2012_South_Sudan.pdf)

⁵⁷ Eastern Equatoria County Consultation Summary (ss.undp.org/Documents/CSAC%20Reports/EES-Summary-Report.pdf)

⁵⁸ Eastern Equatoria State Profile, 1 (unmis.unmissions.org/Portals/UNMIS/.../Eastern%20Equatoria.pdf)

⁵⁹ Southern Sudan Livelihood Profiles, 21; pastoral pages (pdf.usaid.gov/pdf_docs/PNADH322.pdf) and Annual Needs and Livelihoods Assessment 2010/2011, (<http://reliefweb.int/node/389070>)

⁶⁰ Ibid.

⁶¹ <http://theonlyprojectuk.blogspot.com/2011/06/eastern-equatoria-state-part-1.html>

⁶² Annual Needs and Livelihoods Assessment 2010/2011, (<http://reliefweb.int/node/389070>)

⁶³ <http://www.ross-ees.org/Agriculture.html>

⁶⁴ Statistical Yearbook for Southern Sudan 2010 (<http://ssnbs.org/statistical-year-book/>)

east and south, there is little agricultural activity and food production relies almost exclusively on cattle rearing, while the west's wetter areas allow for extensive crop production.⁶⁵

An estimated 19% of the population aged 15 and older is literate,⁶⁶ an unsurprising number considering only 27% of the state's population above the age of six has ever spent any time in school. In terms of healthcare, the maternal mortality rate and under-5 mortality rates are slightly lower than the national average (1,844 maternal deaths per 100,000 births), even though 43% of the population does not have access to healthcare and 46% do not own mosquito nets.⁶⁷ On levels of consumption, Eastern Equatoria is about average compared to nationwide statistics, with individuals spending 103 SSP in Eastern Equatoria against 100 SSP on the national level.⁶⁸

MAGWI

Magwi is a town located in Magwi County, Eastern Equatoria State, roughly 140 km southwest of Juba by road, with a population of about 41,788 people.⁶⁹ Looting and attacks by the Ugandan Lord's Resistance Army (LRA) over the past 15 years and intense fighting between the Government of Sudan (GoS) and the Sudanese People's Liberation Army (SPLA) in the 1980s led people to flee the area. Since the Comprehensive Peace Agreement (CPA) was signed in 2005 and high-level peace talks with the LRA increased security in the county, there have been a large number of returnees to the area.

According to the 2010 Statistical Yearbook for Southern Sudan, 90% of the households in Magwi County practice agriculture.⁷⁰ As in other parts of the county, however, a large number of both planned and spontaneous returnees have lowered the overall percentage of agricultural households in the town. According to the International Organisation for Migration (IOM) there were 552 returnees to Magwi County between October 30, 2010 and July 26, 2011.⁷¹ In addition to the returnee refugees, a poor yield of crops due to an infestation of pests in 2008 created a lack of food.⁷² The large number of returnees and the limited number of functioning boreholes makes the area's water supply inadequate to support the growing town.⁷³ Community leaders interviewed in Magwi stated that youth spend their time cultivating their families' land, but that this provided only enough for survival. USAID's Famine Early Warning System classifies Magwi as being at no or minimal risk; however, this does not mean that there is a large amount of surplus food available for sale.⁷⁴

⁶⁵ Annual Needs and Livelihoods Assessment 2010/2011 (<http://reliefweb.int/node/389070>)

⁶⁶ Key Indicators for Eastern Equatoria, (ssnbs.org/storage/key-indicators-for.../Key%20Indicators_93.pdf) and 2010 Yearbook

⁶⁷ Statistical Yearbook for Southern Sudan 2010 (<http://ssnbs.org/statistical-year-book/>)

⁶⁸ Statistical Yearbook for Southern Sudan 2010, 125 (<http://ssnbs.org/statistical-year-book/>)

⁶⁹ Southern Sudan Centre for Census, Statistics, and Evaluation, *Statistical Yearbook for Southern Sudan 2010*.

⁷⁰ Number of farming households in Magwi County (2009): 24,213

⁷¹ IOM Mission in Sudan, 2011, p. 7

⁷² UNHCR South Sudan Return and Reintegration Program, Eastern Equatoria State Village Assessment Summaries: Overall Comments, 2009 2006.

⁷³ Ibid.

⁷⁴ Famine Early Warning System, 2011, Near-term Outlook for South Sudan.

In 2010, the whole of Magwi County provided primary education to 36,600 primary school students, with a gross enrolment rate (GER) of 89% and a net enrolment rate (NER) of 67%.⁷⁵ There is relatively equal gender distribution among primary school children, with 19,352 of the total primary school children being male and 17,248 being female.⁷⁶ Reliable figures for primary enrolment in Magwi Town itself are not available, but it is known that one school exists in the town to provide primary school education up to grade 7. This school, however, has only 12 teachers, eight of whom are untrained.⁷⁷ After graduating from this primary school, students do have the opportunity to move on to a secondary school in a nearby area.⁷⁸ As a result of this disparity, only 18% of the people in Eastern Equatoria age six and above can read and write.⁷⁹

ABARA

Abara is a small rural town in Magwi County, Eastern Equatoria State. It is about 18 km from Magwi Town and 140 km from Nimule, the largest town in the county.⁸⁰ Most of the residents are from the Acholi tribe and speak the Acholi language. There are no internally displaced people (IDPs) in Abara, but in the beginning of 2008 there were about 3,820 returnees in the immediate vicinity.⁸¹ Given the total population of 6,875 people, returnees account for a significant part of the population.⁸²

In 2009, about 90% of all households in Magwi County were farming households.⁸³ The percentage of farming households in Abara, however, does not match the county average. An influx of returnees to Abara during the dry season in 2008 led to an over reliance on the food produced by people who did not seek to leave during the war. As returnees were incapable of cultivating fields during the dry season, they instead focused on building homes. This imbalance in supply and demand for food has created a food shortage and led to increased malnutrition of children in the area. Contrary to reports of food items such as maize, sorghum, and beans not being sold in the Abara market, researchers observed that these items are imported from Uganda and are available in small quantities.

In 2008, UNHCR replaced the town's open-air primary school with two permanent classroom blocks. Instruction for primary grades 1-6 is offered at this school and the curriculum is taught in English. The government has trained twelve of the teachers in this school, while three are volunteers without training. This is an improvement from the nine qualified teachers that were present at the school in the beginning of 2008. This achievement is in line with Magwi County's superior performance in employing a large number of schoolteachers and maintaining high gross and net enrolment rates.⁸⁴

⁷⁵ Southern Sudan Centre for Census, Statistics, and Evaluation, *Statistical Yearbook for Southern Sudan 2010*.

⁷⁶ Ibid.

⁷⁷ UNHCR South Sudan Return and Reintegration Program, Eastern Equatoria State Village Assessment Summaries: Overall Comments, 2009 2006.

⁷⁸ Ibid.

⁷⁹ Southern Sudan Centre for Census, Statistics, and Evaluation, *Statistical Yearbook for Southern Sudan 2010*

⁸⁰ According to the Abara Payam Administrator.

⁸¹ UNHCR South Sudan Return and Reintegration Program, Eastern Equatoria State Village Assessment Summaries: Overall Comments, 2009 2006.

⁸² Ibid.

⁸³ Calculated based on data from the *Statistical Yearbook for Southern Sudan 2010*.

⁸⁴ Relative to the other counties with Eastern Equatoria; 924 in 2009, the highest of any county in Eastern Equatoria

According to community leaders, a secondary school was constructed in 2008 and operated until April of this year. However the school was forced to close due to the lack of support from the government for staff salaries and school materials. There have been issues similar to this in other areas in the South because of the transition period since the separation of the North and the South.

BUDI COUNTY

The assessment occurred primarily in Chukudum, and also covered eight bomas in Komieri Payam Budi County, Eastern Equatoria: Betelado, Kibiris, Kikilay, Konyo Konyo, Lohipor, Lohomit, Lotegera and Monita.

Budi County has a population of 99,234 with an area of 5,758 km².⁸⁵ Characterized geographically by its hilly and mountainous terrain due to its proximity to the Didinga Mountains, Budi County consists of eight payams: Kimotong, Komori, Loriyok, Lotukei, Loudo, Nagishot, Napak, and Nauro.⁸⁶ Chukudum is the county capital. The County is home to several different tribal groups, including the Didinga, Dodo, and Boya who live in and around Chukudum.⁸⁷ Subsistence farming provides the majority of employment in the region, in addition to the husbandry of cattle, goats, and sheep.⁸⁸ Principle crops grown in this region include millet, sesame, groundnuts, sweet potato, cassava and okra, with sorghum grown in lower-lying areas and maize in the highlands, alongside wild bananas, mangoes and lemons. A hunger gap exists between June and August most years: the period between finishing the reserves from one harvest and collecting the yield from the next. This situation is exacerbated by subsistence farming techniques, pest attacks, poor infrastructure and prohibitively high market prices. Even outside of this season, households have little dietary variation and distended bellies are often evident amongst children.

The status of education in Budi County is strong average in comparison to its neighbours. Of the eight counties in Eastern Equatoria, Budi has the fourth lowest rate for primary school attendance. In 2009, the whole of Budi County provided primary education to 12,648 primary school students, with a gross enrolment rate (GER) of 52% and a net enrolment rate (NER) of 28%.⁸⁹ The gross enrolment rate for primary school students in 2009 for the whole of Eastern Equatoria was 50%.⁹⁰

The majority of bomas studied attested to unreliable water supplies due to a lack of rivers flowing through the region. Communities in Kikilay and Betelado reported each relying on only one borehole and small mountain streams as sources of their water, while residents of Lohipor described a three hour round trip to collect water from a river running through the plains below their villages. Kibiris, Lotegera and Monita only benefited from seasonal rivers through their territory, leaving solely the inhabitants of Konyo Konyo with access to a nearby permanent stream.

⁸⁵Statistical Yearbook for Southern Sudan 2010 (<http://ssnbs.org/statistical-year-book/>)

⁸⁶ibid 31.

⁸⁷ ibid.

⁸⁸ <http://www.ssddrc.org/states/eastern-equatoria.html>

⁸⁹ 2010 statistical yearbook pg. 61.

⁹⁰"Key indicators in Eastern Equatoria," South Sudan National Bureau of Statistics

Chukudum market relies heavily on goods imported to the market from Kenya. The recent dollar crisis has resulted in a lowering of profitability for vendors and allowed domination of a single wholesaler supplying the market, thus resulting in uniformity of stocks and prices.

TORIT

Torit County has a population of 99,740 with an area of 5,795 km².⁹¹ Characterized geographically by its hilly and mountainous terrain, Torit County consists of seven payams: Bur, Himodonge, Hiyala, Ifwotu, Imurok, Kudo and Torit.⁹² Torit Payam is the largest in the county, with 33,657 total residents in 6,166 households, and the city of Torit is both the county and the state capital.⁹³

Excluding Kudo, Bur and Ifuotu Payams, which boast steady harvests, Torit County for the most part remains food insecure and relies on imported vegetables from nearby Kenya and Uganda to supplement those grown locally.⁹⁴ The tribal community in Torit County is diverse, and includes Lotuka⁹⁵, Otuho, Lopits, Lango, Pari, and Tenet peoples.⁹⁶ Subsistence farming provides the majority of employment in the region, in addition to the husbandry of cattle, goats, and sheep.⁹⁷ Sorghum, cowpeas, groundnuts and sesame are grown in both of the annual planting seasons, while second season crops include cassava, sweet potatoes and millet.⁹⁸

The status of education in Torit County is strong relative to its neighbours, but as with all counties and states in the Republic of South Sudan there is significant room for improvement. Torit has second highest rate of children in attendance of primary education in Eastern Equatoria. More than half (56%) of children age 6-13 are enrolled in primary school in Torit County, compared to the 37% of the state average. The gross enrolment rate for primary school students in 2009 for the whole of Eastern Equatoria was 50%.⁹⁹ Literacy for those ages 6 and above is a mere 18% (compared to the national average of 28%), sharing the lowest percentage with Warrap State.¹⁰⁰ School Attendance (ever) is 27% (national average: 37%).¹⁰¹ Despite these challenges, permanent structures for school facilities have increased from 54 (2008) to 102 (2009).¹⁰² Further, total enrolment increased from 22,385 in 2008, and, after a slight dip in 2009, to 24,956 in 2010.

2.2/SELECTED FINDINGS

Satisfaction levels of goods in Eastern Equatoria were particularly low for agricultural products, ranging from eggs, flour, to imported grains and vegetables. The underlying trend for high dissatisfaction levels centred on supply issues, thereby implying a greater need for vocational training in agriculture and

⁹¹Statistical Yearbook for Southern Sudan 2010 (<http://ssnbs.org/statistical-year-book/>)

⁹²ibid 31.

⁹³ibid 31.

⁹⁴ http://www.southsudan-climis.org/attachements/EES_FSL_Bulletin_2009Q1.pdf

⁹⁵http://pdf.usaid.gov/pdf_docs/PNADH322.pdf 86

⁹⁶ <http://www.ssddrc.org/states/eastern-equatoria.html>

⁹⁷ <http://www.ssddrc.org/states/eastern-equatoria.html>

⁹⁸http://pdf.usaid.gov/pdf_docs/PNADH322.pdf 87

⁹⁹“Key indicators in Eastern Equatoria,” South Sudan National Bureau of Statistics

¹⁰⁰ 2010 statistical yearbook pg. 48

¹⁰¹ 2010 statistical yearbook pg. 51

¹⁰² 2010 statistical yearbook pg. 67

animal husbandry; furthermore, supply-chain challenges stemming from a lack of transport options and cross border trade could also be improved.

High dissatisfaction with services also originated from supply problems or inefficiencies, in particular the dearth of transports options, from Boda Bodas to Hiaces. This buttresses the interpretation regarding dissatisfaction levels with goods: supply levels are low in part because of a lack of a means of transporting.

TABLE 16: GOODS & SERVICES WITH HIGHEST DISSATISFACTION BY LOCATION: CHUKUDUM, MAGWI, ABARA, TORIT, EASTERN EQUATORIA, 2011-2012

Goods				Services			
Chukudum	Magwi	Abara	Torit	Chukudum	Magwi	Abara	Torit
Imported grains 77.8% (n=49)	Newspapers/ Imported Grains 93.6% (n=29)	Local Vegetables 70.0% (n=21)	Poultry slaughtered/Fresh Milk 90.0% (n=27)	Computer Technician 91.9 (n=57)	Hiace 66.7% (n=20) (not enough)	Hiace (supply)	Mason 90.0% (n=9) (expense)
Imported Clothes 69.8% (n=44)	Newspapers: supply, i. Grains: expense)	Imported Alcohol 56.7% (n=17)	(i. Poultry: expense, i. Milk supply)	Plumber 87.3% (n=55)	Cut Fruit and Vegetables 56.7% (n=17)	Cell Charger 81.5% (n=22)	Plumber 70.0% (n=7) (expense)
Flour 66.7% (n=42)	Flour (expense)	Eggs 46.7% (n=14)	Eggs/Package d Juice 87.0% (n=47/40) (expense)	Electrician/	Photographer 51.7% (n=15) (supply)	Rolex 74.1% (n=20) (supply)	Bautician 69.0% (n=20) (expense)
Local Grains 63.5% (n=40)	Imported Fruit 83.9% (n=26) (expense)	Rolex/ Charcoal 41.4% (n=12)	Flour 84.6% (n=38) (expense)	Generator Repair 84.1% (n=53)	Boda Bodas/	Fruits and Vegetables (supply)	Gravel 66.7% (n=6) (expense)
Imported Vegetables /Meat/Wood Products 61.3% (n=38)	Poultry Slaughtered 80.6% (n=25) (supply)			Water Collector 82.5% (n=52)	Restaurant 36.7% (n=11)	Restaurant (supply)/Photography (supply) 72.0% (n=18)	Mechanic 64.3% (n=9) (expense)

TABLE 17: LEAST CONSUMED GOODS AND SERVICES BY LOCATION: CHUKUDUM, MAGWI, ABARA, EASTERN EQUATORIA 2011-2012

Goods				Services			
Torit	Chukudum	Magwi	Abara	Torit	Chukudum	Magwi	Abara
Prepared Food 58.1% (n=18)	Spare Parts 69.8% (n=44)	Yoghurt 54.8% (n=17)	Yoghurt 80.0% (n=24)	Electrician 90.3% (n=28)	Restaurants 50.8% (n=32)	Driver 93.3% (n=28)	Garbage / Driver 92.0% (n=23)
Sweets 54.8% (n=17)	Prepared Food 49.2 (n=31)	Prepared Food 41.9% (n=13)	Butter 71.4% (n=20)	Caterer 83.9% (n=26)	Rolex/ Tailor 39.7% (n=25)	Security/ Messenger/ Housekeeper/ Electrician/Dobbi 90.0% (n=27)	Straw Thatcher/ Caterer/ Appliance Repair 88.0% (n=22)
Cloth/Sewing Materials 48.4% (n=15)	Local Clothes 48.4% (n=30)	Poultry Live 38.7% (n=12)	Local Clothes/ Toiletries 64.3% (n=18)	Blacksmith 80.6% (n=25)	Barber 38.7% (n=24)	Cut Fruit & Vegetables 36.5% (n=23)	
Local Clothes 48.4% (n=15)	Yoghurt 46.0% (n=29)	Powdered Milk/ Butter 35.5% (n=11)	Fresh Milk 58.6% (n=17)	Beautician 80.6% (n=25)			
Toiletries 45.2% (n=14)	Butter 45.9 (n=28)						

The least consumed goods in the area all stem from very low levels of disposable income; technical skills training would be unlikely to address in the short term, for such skills would be difficult to apply in context to the market conditions. Perishable food items such as dairy products are under-consumed in large part due to their expenses, supply levels and the lack of refrigeration. Services infrequently utilised include those that relate to property and assets (electrician, housekeeper, security and drivers), implying very low levels of disposable income preventing access to certain (market) valued items worth maintaining or purchasing such services for.

2.3/EASTERN EQUATORIA CONCLUSION AND RECOMMENDATIONS

The most conclusive aspect regarding the assessed areas is that the markets are severely under-developed, despite their proximities to major trade routes and other (international) markets, such as in neighbouring Uganda and Kenya. The main reason for this discrepancy is both the lack of developed roads and transport options, compounded by relatively dispersed population centres, which likewise do not connect with each other through inter-connected infrastructure.

The most successful products in the market are simple local items and foodstuffs with which producers have good experience and that can be delivered quickly and freshly to the consumer. The principle sources of dissatisfaction among consumers centre on a lack of supply, with high purchase prices also playing a critical role. Similarly, due to a lack of disposable income, non-essential services proved to have the lowest uptake rates in the market. Overall satisfaction levels for services are low, with a lack

of supply presenting the principle source of dissatisfaction. This is especially true in areas such as public transportation, for which there is a demand but no current provisions.

In terms of provision of food-based services, although primary dissatisfaction centred upon a lack of service providers, cleanliness, customer service and quality were all also brought into the equation, implying that development to increase service providers and also their expertise (from hygiene to management) is needed. Although the inevitable question of expense arose once again – a more complex issue to resolve – the data indicates that training could lead to useful improvements in this sector.

MAGWI & ABARA

Due to poor market development, there are very few service-oriented businesses in Magwi. Even the ever-present services such as hiaces, rolex makers and teashops have a significant number of non-consumers. Dissatisfaction with goods sold in the market is primarily for the reason of high price or lack of supply. Since most of what is sold in Magwi is imported from outside, high prices and lack of supply are symptoms of the same problem.

As a result of post-conflict trauma, many youth in Magwi exhibit high levels of alcohol abuse and an inability to concentrate. In addition many of them lack the basic academic background to succeed in existing vocational training programmes. In the future, all vocational training programmes should incorporate counselling and basic training in numeracy and communication skills into their curriculum. Currently, there is one vocational training centre in Magwi, but a lack of funding threatens its future existence.

Given Abara's proximity to Magwi, it faces many of the same problems. The market for services within Abara is slightly more developed than the market in Magwi, but luxury services such as catering, driving, and garbage collection are rarely utilised. Furthermore, most service providers in Magwi are retail/shop owners, rather than skilled service providers.

Youth in Abara expressed a desire for training in farming and animal husbandry. As the land around Abara is fertile and the community has traditionally relied on agriculture for income generation, this is a good area to focus on for skill development. Capital for tools and seeds will also be required for this training programme to benefit the community. Currently there is a women's self-help centre within Abara, which has trained a range of women through DED and funding from UNHCR. However, much as in Magwi, this centre lacks steady funding. Although the development of a vocational and skills training is important, the lack of a secondary school in the area makes basic skills training a high priority as well.

CHUKUDUM

Several measures exist that can help alleviate market deficiencies:

- Improvement of local infrastructure, including the encouragement of currently lacking local transport options, would allow farmers to sell their own crops as opposed to operating through middlemen, thus generating a greater incentive for higher crop production.

- Consumer demand surveys revealed a local interest in bread, a product that can be baked locally and sold fresh, representing a potential gap in the market currently filled by a single supplier. Likewise, a large number of consumers indicated a desire for more fresh juice in the market. Given the abundance of raw ingredients and the ease with which it can be made, this may serve as another potential area for development.
- Prerequisites for market expansion include the development of trunk roads that link Budi County with other principle centres such as Juba and Torit, increased dollars released into the market, improvement of the security situation and injections of capital.

TORIT

Specific vocational and business training programs can capitalize on market gaps for employment and income generations in Torit:

- There should be an increase capacity in poultry, meat (beef and cow), and dairy production, which would develop all related and derivative products (eggs, yoghurt, etc.). If resources allow, training in beekeeping for honey production would be beneficial. Further, poultry, meat and cow, along with other basic crops and goods are areas that could be improved to provide consistency and resiliency from season-influenced breakdowns.
- For youth, current economic activities include shop assistant, boda-boda driving, SPLA conscription, charcoal making, water selling, brick laying, and agriculture. Expanding and diversifying possible income-generating activities is a key concern for both livelihoods and resilience. For skills training, there are diverse requests for vocational skills. For young women, there is the potential to create employment by increasing the number of beauticians, such as fostering internship programs with existing beauticians. Female adults could master a more regional style of cooking, suitable for catering, as well as more straightforward teashop occupations. Young men expressed a desire to operate boda-bodas. Older males would benefit from business skills that could be incorporated into trade, as well as specific niches like electricians and welding.
- Though some micro-finance institutions and trade unions exist, capital requirements for running and starting businesses are prohibitively high and have recently increased. Recommendations include re-vamping and institutionalising micro-finance organisations that also provide investment/business plans advice, thereby enabling smaller, cheaper operations to expand with prudent investments and savings. Village savings and loans associations should be strongly considered.
- Although consumers identify expense as the main source of dissatisfaction for many goods, a main contributing reason for this high expense is lack of supply for the goods, suggesting that trade routes, optimisation of local goods production and supply/value chains are necessary programmatic goals worth pursuing. The lack of feeder roads inhibits getting produce to markets in Torit.

03/WESTERN EQUATORIA

Forcier Consulting conducted an assessment of Yambio in Western Equatoria for the UNHCR, titled *Market and Livelihood Assessment for Returnees*. The purpose of this assessment involved understanding the diverse variables that underpin sustainable livelihood generation for returnees and host communities is of paramount importance, particularly in areas such as Torit, Eastern Equatoria State and Yambio, Western Equatoria State where high numbers of IDPs have been recorded.¹⁰³ This Market & Livelihoods Assessment for Returnees in Torit and Yambio Counties is intended to identify and assess potential areas for vocational training and skills development of returnees based on prevailing consumer and market opportunities, as well as to identify various factors and challenges for employability and employment creation.¹⁰⁴

3.1/INTRODUCTION TO ASSESSED AREAS

YAMBIO

Western Equatoria and Yambio have generally received low numbers of returnees, approximately 52,000 between 2007 and December 2012, or 3% of the total number of returnees to South Sudan, according to the IOM Tracking and Monitoring Database. Educational opportunities are limited but increasing. Literacy for those ages six and above is 30% (national average: 28%).¹⁰⁵ School attendance (ever) is higher at 58% than the national average of 37%.¹⁰⁶ The gross enrolment rate in primary school 51.9% is lower than the national average of 68.8%.¹⁰⁷ Total enrolment increased from 16,252 in 2008 to 17,909 in 2010.¹⁰⁸ Permanent educational facilities structures increased from 57 in 2007 to 100 in 2009.¹⁰⁹

3.2/SELECTED FINDINGS AND ANALYSES

TABLE 9: GOODS & SERVICES WITH HIGHEST DISATISFACTION BY LOCATION: YAMBIO, WESTERN EQUATORIA, 2011-2012

Goods	Butter 100.0% (n=27) (expense)	Yogurt/Slaughtered Poultry 96.3% (n=26) (i. Yogurt: expense, i. Poultry: supply)	Fresh Milk 85.3% (n=29) (supply)	Toiletries/Beauty Items 80.4% (n=37) (expense)	Live Poultry 61.3% (n=19) (expense)
Services	Construction 96.9% (n=32)	Caterer 93.8% (n=15)	Gravel 89.4% (n=42) (expense)	Generator Repair/Plumber 86.5% (n=32/19) (i. Geerator Repair: expense)	Computer Technical 84.8% (n=28)

Because goods like butter, yoghurt, fresh milk as well as slaughtered poultry and live poultry are among those goods with the highest levels of dissatisfaction, a key point of action is to increase capacity and efficiency of cow/goat meeting production and all of its value-chain derivatives; this relates to animal husbandry and the idea that poultry is a key point of concern for many goods (despite the fact that eggs have high satisfaction rates). Furthermore, underutilized or under-

¹⁰³ Terms of Reference, UNHCR Market & Livelihoods Assessment for Returnees, Torit, Eastern Equatoria State and Yambio, Western Equatoria State, October 2012.

¹⁰⁴ Ibid.

¹⁰⁵ 2010 statistical yearbook pg. 48

¹⁰⁶ 2010 statistical yearbook pg. 51

¹⁰⁷ 2011 statistical yearbook pg. 32

¹⁰⁸ 2011 statistical yearbook pg. 30

¹⁰⁹ 2010 statistical yearbook pg. 67

explored sectors with high potential for growth as determined from interviews with a chief indicate that coffee production and pineapple farming could be grown, developed, or re-vamped.

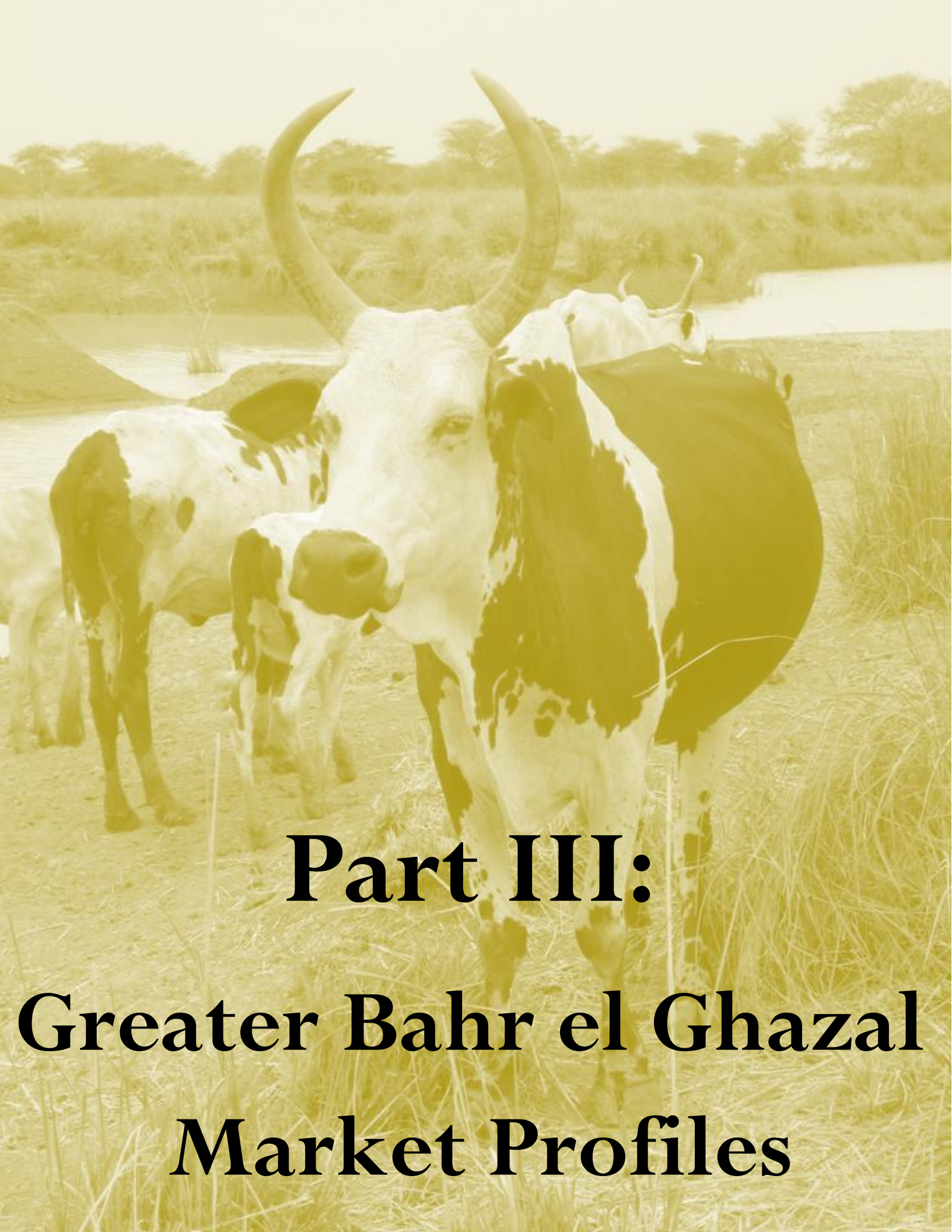
The market demand for goods indicated groups of goods that were *highly* consumed—by nearly everyone. Services in Yambio are not as commonly consumed as goods. This indicates the possibility of either 1) elevated levels of disposable income or, 2) lower prices than in other locations, influenced in part by levels of supply (of key inputs) to make these services available; or even 3) a combination of the two.

The number of services in Yambio that are consumed by at least half of the respondents in Yambio is 15. Six of these services are consumed by more than 80% of the respondents. No clear listing of services existing that correlated to their inelastic nature (i.e. rolex services are consumed often in part because everyone needs to eat). The main reason for dissatisfaction for most services is expense. (The only different service with a different dissatisfaction reason is “unsafe driving” for hiaces.) Nevertheless, there are also a number of services that share high rates of *satisfaction*, such as teashops (85.8%, n=56), water delivery (83.3%, n=55), and rolex, chapatti, and mandazi (86.4%, n=57) providing services.

3.3/ CONCLUSION AND RECOMMENDATIONS

Based on this assessment, the following findings and recommendations may be offered for Yambio:

- Slaughtered poultry and live poultry are among those goods with the highest levels of dissatisfaction. A key point of action involves increasing capacity and efficiency of poultry production to reduce prices at market; increasing local production by consolidating cooperatives, increased training, visits from technical advisors, and generalised supervision (with support from local governments) would all help alleviate these market shortcomings. All manners of chicken and poultry maintenance and farming should be better executed. Agriculture in broad terms is also always a field in need of development because the livelihood zone denotes the area as the breadbasket of South Sudan, though a concentration on rice, groundnuts (for oil), beans, fruit for juice, pineapple and onion would be beneficial.
- It is essential that programming continue to promote capacity building of local farmers to increase local production to meet demand. Powdered milk, imported vegetables, and imported fruit are goods that are highly consumed but have very high rates of dissatisfaction due to the expense of goods. These products may be considered for supply side activities.
- The most significant challenges for returnees are food and water security, as well the necessity to build their own homes. Furthermore, work and employment challenges are comprehensively limited: there is little disposable capital to use for starting businesses, and not everyone has applicable working skills, particularly those from Khartoum. Advocacy should continue with other agencies and donors to provide support in the forms of community-based food security, water and sanitation, health and other basic services in various communities in favour of integrating returnees/IDPs.
- Skills training demands include regional cooking for females (though there already is knowledge on how to cook, they would like to learn skills necessary for local fare preparation in restaurants) and other skills. Furthermore, there was an explicit calling for more school education among the youth. Qualitative interviews further highlighted a general consensus on the utility for English, business, finance, and numeracy skills. Other skills listed include: electrician, carpentry, (auto) mechanic engineering. There is also the suggestion that welding is an underutilized sector with high potential for growth.
- There is a formal vocational training centre near Yambio and other capacity building activities in various locations, including World Vision and InterSOS through UNHCR. There are also informal training garages teaching auto-mechanics, metals, vehicle body works, and driving. Some returnees mentioned that UNHCR came by for some training (not vocational), and that it only lasted a few days. However, there are significant opportunities for further skills development and training for returnees. Additional vocational schools should be built not only in Yambio but also in other counties in order to provide further opportunities for skills acquisition for returnees.
- Flooded roads and rains prohibit business confidence reliant on greater region supply chains. Variability within market then increases livelihood insecurity.



Part III:

Greater Bahr el Ghazal

Market Profiles

<u>Lakes</u>	<u>Warrap</u>	<u>N. Bahr el Ghazal</u>	<u>W. Bahr el Ghazal</u>
		Aweil Town	
		Gok Machar	
Rumbek	Kwajok	Ariath	Wau
		Wanjok	
		Malualkon	

01 / LAKES

As part of the collection of assessment conducted for UNHCR, Forcier Consulting completed its *Market and Livelihoods Assessment for Returnees* in Rumbek, the capital in Lakes State.

1.1 / INTRODUCTION TO ASSESSED AREAS

Rumbek town (henceforth referred to as Rumbek), is the capital of Lakes State, located in Rumbek Central County. Due to its location in the western flood plains agro-ecological zone, Rumbek is prone to seasonal flooding during the rainy season. Agro-pastoralism is the dominant form of production in Rumbek and the surrounding areas. The rainy season normally starts in March and ends at the end of November. For the last 3 years, the rainy season has been marked by less frequent rains. Rains are now starting in April and only lasting until September. This is creating problems for agricultural production within the region. The predominant ethnic group in Rumbek is Dinka, with the main languages spoken being Dinka, Sudanese Arabic and English.

After the signing of the comprehensive peace agreement (CPA) on January 9, 2005, Rumbek was declared the South's temporary capital. Like many South Sudanese towns, Rumbek suffered significant infrastructural damages during the civil war. Prior to 1997, Rumbek was controlled by the North, causing residents to flee from the town centre. There were no locals in the town until 1997, when the SPLA re-captured the town. It was not until the CPA that those who had fled to the North began to return to Rumbek.

Apart from inter-communal fighting that has periodically displaced residents and disrupted livelihood activities, Rumbek County has been relatively secure in the past few years. After the CPA was signed and security improved in the area, many IDPs returned to Rumbek. Since independence, Rumbek has had even more people who fled during the civil war return to the area. According to the International Organization for Migration (IOM), as of January 26, 2011, 987 individuals have returned to Rumbek.¹¹⁰ The majority of people returning are coming from Khartoum, but there are also a small number of people from other places in the North.

There is a good selection of goods in Rumbek Market. There are, however, constraints on supply, which has resulted in rising prices, especially on staple food items such as sugar, flour and grains.

¹¹⁰ UN Office for the Coordination of Humanitarian Affairs (OCHA), *Sudan: South Sudan - Number of Returnees by County (Arriving 30 Oct. 2010 - 25 Jan 2011)*, 26 January 2011.

Rumbek market offers a wide variety of services, catering to the majority of the customers' needs. However, with rising food prices and supply constraints on materials some services have had to raise their prices to account for higher production living costs.

RUMBEK MARKET

Seventy-six retailers were interviewed for the Market Opportunity survey and the age range was 19-56, showing good age diversity in Rumbek market. The majority of the people interviewed, 71.1 % (n=54), were from South Sudan. The remaining retailers come from Uganda, Kenya and Darfur.

Rumbek market is a vibrant area stretching over several blocks. Like other markets in South Sudan, it is divided into different sections based on the goods on sale or services provided. The majority of goods are imported from other cities in the South or from areas outside the South, such as Khartoum, Uganda or Kenya. While there were no local business owners while the North controlled the city, people from Rumbek are increasingly taking ownership of businesses in the market. There is still a large presence of foreign shop owners and workers, predominantly from Darfur, Uganda and Kenya.

The market has its own steady pace and does not change much throughout the day. As a number of shop keepers are Muslims from Darfur, Islamic holidays such as Ramadan are acknowledged. On these holidays, shops will open a few hours later and close around 5 or 6 in the evening to partake in the traditional breaking of the fast. Other than this, the market is rarely closed with the exception of public holidays.

1.2/SELECTED FINDINGS

Respondents were most dissatisfied with sugar (91.1 %, n=41), imported grains (86.7 %, n=39), and goat meat (80.0 %, n=36), mainly for the reason of price. Like much of South Sudan, constraints on food imports and rising prices greatly affect the food security of the people of Rumbek. Increasing food production in Rumbek and

surrounding areas would greatly benefit the community as a whole by reducing food insecurity and creating employment opportunities for returnees.

High levels of dissatisfaction were also expressed with yoghurt (77.8%, n=35). Lack of supply was the main reason given, while some indicated that they were unhappy with the price. In the case of butter, 62.2 % (n=28) were dissatisfied, with all but one respondent complaining about the lack of supply of butter in Rumbek market. As a large number of the people in Rumbek have spent considerable time in the North or neighbouring countries such as Uganda and Kenya, where yoghurt and butter are widely available and part of the local cuisine, it is fair to assume that their eating habits have changed over the course of their time abroad. Coming back to Rumbek, people have naturally created a new demand in the market. As such, it is recommended that the local production and sale of processed dairy products be encouraged.

BOX 3: GOODS WITH HIGHEST DISSATISFACTION, RUMBEK, 2011

Sugar (91.1%, n=41)

Imported Clothes & Footwear (91.1%, n=41)

Toiletries (86.7%, n=39)

Flour (86.7%, n=39)

Imported Grains (86.7%, n=39)

Respondents were **most satisfied** with second-hand clothes and footwear and items made from dried grass or leaves, both at 62.2 % (n=28). The majority of respondents were consumers of most, if not all, products.

BOX 4: SERVICES WITH HIGHEST DISSATISFACTION, RUMBEEK, 2011

- Ladies Salon (77.8%, n=35)
- Mobile Phone Repair (71.1%, n=32)
- Rickshaw (66.7%, n=30)
- Computer Technician (66.7%, n=30)
- Hiace or Rosa (64.4%, n=29)
- Street Food Vendor (64.4%, n=29)
- Dobbi (64.4%, n=29)

There were relatively high levels of dissatisfaction across all services: the only service which over half of respondents were satisfied with was a water collector (64.4%, n=29). The high levels of dissatisfaction coupled with the high levels of consumption confirm that the service sector is one in which there are many opportunities to break in and expand. Of the service providers represented in the survey, the

highest levels of dissatisfaction were expressed about ladies saloons (hairdressers), with 77.8 % (n=35) of the respondents being dissatisfied, mainly for the reason of price. Mobile phone repairmen were the service providers that dissatisfied respondents the second most at 71.1 % (n=32), while computer technicians and rickshaws split even with 66.7 % (n=30) of all respondents being dissatisfied with their services.

In terms of satisfaction, the only service that stood out was water collector with 64.4 % (n=29) of the respondents noting that they are happy with the providers of this service. Almost all services had been used by more than two thirds of the respondents with the exception of plumbers (57.8 %, n=26) and dairy farmers or cattle keepers (44.4. %, n=20).

TABLE 18: LEAST CONSUMED GOODS, RUMBEEK, 2011

Least Consumed Goods	Least Consumed Services
Cement Blocks 42.2% (n=19)	Plumber 57.8% (n=26)
Cloth and Sewing Items / Spare Parts for Bikes, Cars and Bodas 37.8% (n=17)	Dairy Farmer or Cattle Keeper 44.4% (n=20)
Locally Made Clothes and Footwear / Butter 35.6% (n=16)	Electrician 37.8% (n=17)
	Hiace or Rosa / Photographer or Videographer 35.6% (n=16)

Respondents were most likely to have used the services of a straw thatcher (97.8%, n=44), a tailor (95.6%, n=43), and a rickshaw (95.6%, n=43). These are all somewhat basic and relatively cheap services, however many more specialised and expensive services such as mobile phone repair (84.4%, n=38) also had high levels of consumption. This suggests that, although consumers in Rumbek are

more likely to use cheaper services, there is also a market for more skilled ones.

Respondents were least likely to have used the services of a plumber (only 42.2%, n=19) and a dairy farmer or cattle keeper (65.6%, n=25). Although the majority of people had not used a plumber, all but one of those who had were dissatisfied with the market. In addition, even with these services, around half of respondents had used them, showing that all services in Rumbek are utilised by a significant proportion of the population. This is probably due to people in Rumbek having some disposable income, and is a sector that is likely to grow as Rumbek develops economically.

1.3/LAKES STATE CONCLUSIONS & RECOMMENDATIONS

Many of the programs listed above would be beneficial to returnees. In order of priority for returnees, these programs are:

- Due to the fact that the people in Rumbek are agro-pastoralists, the provision of **agricultural training** is important. This training should be combined with the lending services in terms of financial capital or in terms of the provision of tools and seeds.
- An emphasis on the **production of local goods**, such as vegetables, would be very beneficial for the both the host and returnee communities. This would help reduce food insecurity and create employment opportunities.
- According to findings, there is an insufficient supply of **electricians, computer technicians** and properly trained **drivers** in Rumbek. The provision of vocational training programs in these sectors would address the dissatisfaction expressed by the community. This would also create job opportunities for both host and returnee communities.

Below are some general recommendations that should be considered when developing any job creation program in Rumbek:

- **Business training** should be offered in conjunction with **micro-finance**. Start-up capital is one of the main barriers for people in Rumbek. Providing adequate training in business would give individuals the skills and knowledge to properly run a business and the provision of start-up capital will enable the creation of new businesses in the market and employment opportunities.
- **Peace and conflict resolution training** would be greatly beneficial for the host community and returnee community. Offering a training program in peace and conflict resolution would help returnees reintegrate into the community and bring the community together as a whole.

02/WARRAP STATE

Forcier Consulting conducted one market assessment in Kwajok, Warrap State as part of a series of market assessments sponsored by UNHCR. It is titled *Market & Livelihoods Assessment for Returnees*.

2.1/INTRODUCTION TO ASSESSED AREA

The area around Kwajok is dependent on agriculture, with 81% of people depending on crop farming as their main source of livelihood, and a total of 86% of the population lives in households whose main livelihood is agriculture or livestock; this figure is significantly higher than the countrywide figure of 78%. Additionally, 5% of the population lives in households whose main livelihood is wages and salaries; 2% live in households whose main livelihood is owned business enterprises; and less than 1% live in households whose main livelihood is one of the following: property income, remittances, pension, or aid. According to the 2010 business listing survey, 457 businesses are registered in Kwajok; 72% of these are “shops”, while 18% are “restaurants and hotels.”

Community leaders in Kwajok indicated that the land was very fertile, but that it was underutilised. People fish in a nearby river, but this dries up during the dry season. The rainy season runs from June to November, but a lack of rain this year has meant the river is largely dry. The flora around Kwajok is characterised by scrubland with thick ground cover beneath.

Compared to the rest of South Sudan, Warrap is relatively poor with 64% of residents living below the poverty line. Average per capita consumption in Warrap is 67 SSP per person per month compared to average of 100 SSP per person per month throughout all of South Sudan.

Warrap has been greatly affected by the decades of civil war. The conflict and general poverty in the region has led to a disruption in peoples’ education, and currently 73% of people cannot read and write. According to the World Bank, Warrap’s net primary school attendance rate is 21%— the lowest in South Sudan. There is a hospital, but it does not have medicines to dispense, and when people are ill they often have to go to Wau, two hours drive away. There currently no vocational training centres or microfinance organisations operating in Kwajok. Various NGOs have said that they plan to offer training in the returnee camp, but these training programmes have yet to materialise. GIZ, however, has solid plans to set up a vocational training program for tailoring and mechanics in the near future.

The role of gender in Kwajok greatly affects peoples’ life choices and opportunities. Although community leaders were supportive of women working, the variety of jobs “suitable” for women was very restricted. Women sell vegetables informally on the side of the street, for example, whereas men selling vegetables, typically do so in formal shop that has a diversity of products. Women also run restaurants and teashops, but the sheesha’s that are sold alongside the tea will generally be managed separately by a man. During the civil war, the men were mostly soldiers, and the women generally made money through cooking for the soldiers in the area, washing their clothes, and other chores. Since peace has come, many work opportunities for women have disappeared and social expectations have changed.

Warrap State, specifically the areas around Warrap Town and Kwajok, has received a large number of returnees. As of July 2011, there were an estimated 115,000 IDPs in Warrap State; of these, approximately 31,000 people (or 4,700 households) had arrived and settled in Kwajok. According to a

July, 2011 report by ACT Alliance, conservative estimates are that an additional 22,000 people (or 3,145 households), will arrive in Warrap State in the coming months, with Kwajok being the major concentration point for many.” As the result of recent violence in Abyei, over 115,000 IDPs have relocated from Abyei to Warrap State this year. Although IDPs from Abyei have primarily settled in Agok, this influx has put a tremendous strain on the Warrap State government and has decreased the resources available to returnees near Kwajok. Some analysts argue that the high number of returnees to Warrap is creating an emerging situation of conflict between the returnees and the host community due to land allocations and inadequate basic services.” However, no major incidents have occurred to date.

The returnee camp in Kwajok is called “Khartoum Jedid,” which translates as “New Khartoum”. Almost all of the returnees in this camp have come from Khartoum. There are also some returnees staying in Kwajok itself, but these are mostly those who had family that remained in the area. Khartoum Jedid is around fifteen minutes drive, or one hour’s walk, from Kwajok, past a separate village. It is very large, and is divided into 26 blocks, each with its own community leader. These community leaders together form a management committee that regularly meets. The community leaders estimate that each block has a population of 370, making the total population of Khartoum Jedid around 9,620.

2.2/SELECTED FINDINGS

Respondents were most likely to be dissatisfied with products because of their cost, followed by a lack of supply. These two complaints are closely related. Promoting the local production of these goods would create competition for imported products and bring down the general price of products, in addition to increasing supply. The issue of price could also be addressed in other ways.

BOX 5: GOODS WITH HIGHEST DISSATISFACTION, KWAJOK, 2011

Toiletries (62.2%, n=23)
Sugar (48.6%, n=18)
Packet Milk (43.2%, n=16)
Imported Clothes & Footwear (43.2%, n=16)
Live Poultry (40.5%, n=15)
Flour (40.5%, n=15)

For example improving techniques for raising and slaughtering poultry or introducing new breeds of poultry that produce more meat would bring down the cost of poultry and related products in the market.

Overall, satisfaction levels were low. Those services with the highest levels of satisfaction also showed high levels of dissatisfaction. As Kwajok develops economically and people have more disposable income, it is likely that the levels of service usage will steeply rise, becoming much more in demand. For the moment, however, it is only the cheapest and most basic services (such as teashops and restaurants) that are widely used. It should be noted that even in the case of restaurants and teashops, all dissatisfied respondents noted price as the primary reason. This should be taken into account when implementing skills training programs. Despite this, meetings with community leaders in Kwajok suggest that when a service was absolutely necessary and could not be attempted by an unskilled worker, they were willing to pay for it. For example, midwifery was a skill that community leaders in

BOX 6: SERVICES WITH HIGHEST DISSATISFACTION, KWAJOK, 2011

Rickshaw (40.5%, n=15)
 Mobile Phone Repair (32.4%, n=12)
 Tailor (32.4%, n=12)
 Restaurant (37.8%, n=14)
 Dobbi (40.%, n=15)
 Hiace or Rosa (32.4%, n=12)

Kwajok said was lacking in their community, and when asked whether people would be able to afford to pay midwives, the group unanimously said they would because it is such an important service.

TABLE 19: TOP FIVE UNCONSUMED GOODS & SERVICES, WARRAP STATE, 2011

Goods	Services
Spare Parts for Bodas, Bikes and Cars 86.5% (n=32)	Computer Technician 91.9% (n=34)
Butter 81.1% (n=30)	Construction Worker 86.5% (n=32)
Imported Vegetables / Local Metal Goods and Furniture 75.7% (n=28)	Electrician / Mason or Bricklayer 83.8% (n=31)
Imported Grains)/ Imported Bread/ Yoghurt / Bricks / Cement Blocks 78.4% (n=29)	Plumber 89.2% (n=30)

2.3/WARRAP CONCLUSIONS & RECOMMENDATIONS

Kwajok is located in a region still recovering for decades of civil war. Most people chronically live below the poverty line and employ various coping strategies such as participation in the shadow economy or living with minimal food intake. Kwajok receives many returnees from Khartoum, but it is also impacted by forced migration as a result of border conflicts. Flour, sugar, teashops, restaurants, and mobile phone repair are all goods/services with high demand and low consumer satisfaction. As a result, we recommend that interventions target these areas.

Prioritisation of livelihood/MSE options for Returnees

The following prioritisation list is based on our market evaluations described above. Areas with a combination of high consumer demand and low market supply were selected. Furthermore, the interventions opportunities listed below are relatively easy to implement because they each require skills that can be taught in a brief period of time (6-9 months) and through a non-formal training program.

- **Agricultural training** should be offered on a large scale to returnees in Khartoum Jedid. This training should be tailored to maximise the utility of small amounts of space. For example, intercropping or prioritising crops that take up little room and produce large yields. Training in agricultural should also incorporate basic business skills, so that producers can either set up business or sell to existing businesses.
- **Training in poultry raising** should be implemented, both for the production of chicken meat, and for that of eggs. Linkages with restaurants in Kwajok should be explored, as chicken

is currently nearly twice as expensive as beef in some restaurants.

- A small number of female candidates who show promise should be selected for **midwifery training**. It is envisioned that these women would primarily work within Kwajok where people have more disposable income, but increasing the number of midwives within Khartoum Jedid would also be useful for the returnee community.
- A small number of people should be offered training in **appliance repair**, concentrating on mobile phones and electrical equipment.

General Recommendations for Kwajok Interventions

- All trainees should be provided with support during the training process in the form of food for themselves and their children. If this is not included, those who have many dependents may be unable to take advantage of the training opportunity.
- **Mobile phone repair training** is a specific area for intervention due to a burgeoning mobile phone market.
- Restaurants, teashops, and agriculture products are three additional areas with high consumer demand, but low consumer satisfaction. **Business training** for owners of restaurants, teashops, and shopkeepers will help these business owners to more effectively respond to market preferences. In the case of shopkeepers, training should include methods to analyse supply networks to minimise product costs.
- All business training programmes, as well as all vocational training programmes, should include **basic numeracy and literacy** due to the low primary school rates of the projected participants.
- **Microfinance loans** should be offered as a part of all vocational and skills training programmes, as a lack of funds to start-up business was consistently identified as the main barrier to self-employment/income generation.
- In order to secure the repayment of these loans, basic money management skills should be incorporated into all training programmes as well.

03/NORTHERN BAHR EL GHAZAL

Three assessments were conducted that included Northern Bahr El Ghazal. For UMCOR, the *Assessment of Possible Livelihood Activities in Aweil North, South Sudan* focused only on that location, while the UNHCR assessments focused on a *Market and Livelihoods Assessment for Returnees in Aweil Town*. Save the Children, with its *Labour Market Assessment & Vocational Training Opportunities Study* focused on Aweil East and Aweil North Counties.

3.1/INTRODUCTION TO ASSESSED AREAS

Northern Bahr el Ghazal (NBeG) covers an area of 30,543.33 square kilometres and has an estimated population of 720,898, making it the second most densely populated state in South Sudan after Central Equatoria.¹¹¹ Aweil is its capital, with an estimate population of 59,217.¹¹² NBeG borders Western Bahr el Ghazal to the west and south, Warrap and Abyei to the east, and Darfur to the north.

Due to its proximity to the north, NBeG has relied more on trade routes with Khartoum than with other countries such as Uganda and Kenya. It has therefore been severely affected by the closing of borders since May 2011 in the lead up to the independence of South Sudan, and it is one of the poorest states in the country. A full 75.6% of people live below the national poverty line (compared to the national average of 50.6%). Per capita consumption in NBeG is the lowest of all states, averaging only 60 SSP per month (compared to the national average of 100 SSP per month), and only 25% of the population are able to read and write (compared to the national average of 28%).¹¹³

Aweil East is the largest and most densely populated of the five counties of Northern Bahr el Ghazal, with a total estimated population of 309,921, and an area of 6,172.23 square kilometres. The county headquarters is located in Wanjok, Baac Payam—one of the sites of this research. The second location, Maluakon, is also located within Baac Payam, which has a total estimated population of 79,462. Each of these communities is described in more detail below.¹¹⁴

Aweil North has an estimated population of 129,127 and an area of 6,376.53 square kilometres, resulting in a population density of only 20.25 persons per square kilometre, half that of Aweil East (50.21 persons per square kilometre). At the time of the study, 52,805 former refugees and internally displaced persons had returned to Northern Bahr el Ghazal, 8,828 of whom returned to Aweil North County.¹¹⁵ The county headquarters is located in Gok Machar. The second site, Ariath, is located in Ariath Payam, which has a total population of 14,592 individuals.¹¹⁶

Socio-Economic Context of Northern Bahr el Ghazal

As mentioned previously, Northern Bahr el Ghazal state (NBEG) borders Sudan's South Darfur State and the disputed CPA Transitional area of Abyei. Both of these routes were traditionally vibrant trade routes and the state's economic profile has been contingent on cross-border trade with what is now Sudan throughout the conflict and the interim CPA period of 2005-2011. Besides trade and functioning

¹¹¹ Statistical Yearbook of Southern Sudan 2010, Southern Sudan Centre for Census, Statistics and Evaluation.

¹¹² Ibid.

¹¹³ Ibid.

¹¹⁴ Ibid.

¹¹⁵ Number of Returnees by County, 30 October 2010-29 March 2011, UN-OCHA. Code SS-0182a, 30 March 2011.

¹¹⁶ Statistical Yearbook of Southern Sudan 2010, Southern Sudan Centre for Census, Statistics and Evaluation.

as a gateway for goods from the North into Southern Sudan, NBEG also produces rice, sorghum, groundnuts, sesame, sugarcane and a small quantity and variety of local vegetables. Rice, sorghum and sugarcane are the only crops that at one point have been exploited commercially with varying success.¹¹⁷ At the time of writing, an EC-funded rice scheme spanning approximately 1,200 feddans was being implemented by GIZ in cooperation with the state Ministry for Agriculture and Forestry. There are also a number of commercial ventures in agriculture, mostly sorghum and groundnuts, such as the plantation operated by the Thai/South Sudan owned ABMC Company.¹¹⁸

Major economic activities however rely on trade with the North, and at a time when the border with Sudan remains officially closed traders have re-routed their supply routes to Kenya and Uganda through Wau. This has caused prices to rise by almost 100% in some cases, thereby making the economic context very unfavourable for a large segment of the state's inhabitants. This combined with a high influx of returnees from the North and a very low yield from this year's harvest renders NBEG a very challenging environment for the lowest income families and vulnerable groups. According to various sources (although not verified with the local police), petty crime and prevalence of street children has increased significantly since the borders with Sudan closed shortly after South Sudan's secession in July 2011. Nevertheless, regarding security, NBEG is considered much safer now than in previous years. However, this "perfect storm" of factors hampering socio-economic security places NBEG on a very ambiguous line between requiring emergency relief or more development-oriented assistance.

AWEIL TOWN

With a poverty headcount rate of 76% Northern Bahr el Ghazal is South Sudan's most impoverished state. The population of Northern Bahr al Ghazal is predominantly rural (90.6%). 78.9% of Northern Bahr el Ghazal households earn their livelihoods through crop farming, and 0.7% earn their livelihoods through livestock farming. Compared to the rest of South Sudan, a relatively small percentage of households are primarily dependent on wage labour (0.7%) while some 5.7% owned a business enterprise.

The Aweil market is filled with a variety of shops and businesses. Each "industry" is concentrated in a specific area, with related services and goods located in close vicinity. While one area is dedicated to food in all shapes and forms, clothing and shoes are found in another.

GOK MACHAR

Gok Machar is the seat of Aweil North County. Seventy kilometers from the border with Darfur, Gok Machar receives most of its imports from Darfur and Northern Sudan.

Gok Machar's market is currently in a phase of rebuilding: three fourths of the market burned down in April 2011. Only a few shops with permanent (brick) buildings were saved along with one more isolated section of the market. Retailers and community members stated that they received no organisational support in rebuilding, and that the market—and its retailers—are still not at the level they were at before the fire.

¹¹⁷ Background information and facts obtained from interviews with the state chamber of commerce

¹¹⁸ Information obtained from interviews with UNOCHA and the Aweil RRC director.

Currently residents of Gok Machar primarily engage in agriculture or pastoralist livelihoods—either farming or herding cattle, goats, or sheep—while some community members own shops, restaurants, or small businesses (including ox or donkey ploughing services). For “rapid income generation activities,” some people (particularly returnees) will cut poles for use in construction, collect firewood, or gather wild foodstuffs (including various greens, and honey) for sale in the market.

There are currently no vocational training or livelihoods programs in or near Gok Machar; those who have specialised skills such as tailoring, carpentry, or construction either learned in other counties or were trained as apprentices. The majority of locally developed products are fairly rudimentary. There are very few formally trained carpenters.

Currently the major problem facing the Gok Machar community is the integration of returnees into the larger community. The majority of returnees engage in rapid income generation activities (selling firewood, building poles, or personal possessions) to feed their families, and are unable to develop livelihoods that are able to actually support them. Children of returnees who are unable to find enough food to support themselves spend all their time in the markets, collecting and selling empty bottles or removing trash for small amounts of money, and begging for leftovers from restaurants. The children sleep in the marketplace or empty restaurants, and are often harassed by the police during the night.

ARIATH

Ariath Market, in Ariath Payam, is twenty minutes drive from the bridge connecting Aweil North and Aweil Center Counties. Currently most residents earn money from cattle and livestock sales, farming, masonry, and building. For rapid income generation activities, some people cut poles for building materials and sell them in the market, or make local charcoal.

There is currently a very large population of returnees in Ariath, and community leaders, while they lacked exact figures, estimated that currently returnees outnumber residents. Community leaders also stated that the majority of returnees in Ariath had not registered with the IOM or any other agencies upon their return, and have received no support from the international community or the local government. There are high levels of unemployment in Ariath, particularly among youth and returnees. Primary challenges to businesses in Ariath are individuals’ lack of capital, and the quality of roads preventing restocking during the rainy season. There are no organisations or associations offering assistance or even loans to locals who need capital, and so all businesses are started with either personally raised capital (from livestock sale or savings) or with loans from family and friends. Returnees, because of their status, have even greater trouble raising capital.

The difficulties of opening businesses aside, the main problems facing the people of Ariath is unemployment and lack of food for returnees. With many refugees not registered with any agencies, lobbying for food aid is difficult for community leaders.

WANJOK

Wanjok is a vibrant hub for commerce and trade in Aweil East County. As for most of the commercial centres in NBEG, recent surges in prices due to the closing of the Northern border with Sudan have had a big impact on economic life in Wanjok town. Many skilled labourers and small business owners went out of business and/or left for the State capitals of Aweil and Wau. According to community leaders,

the closed borders specifically affect those who used to rely on small-scale trade with commercial centres in South Kordofan and South Darfur.

Interestingly, whereas in Aweil town there has been a reported increase in petty theft and street children, local community leaders and the Aweil East County Commissioner consider such changes as having not affected Wanjok. When particular individuals or families face life-threatening problems, the extended family must fulfil their responsibility in caring for these individuals. These informal institutional arrangements, whereby the community ensures a safety net for all its members, are enforced by the community leaders under penalty of asset confiscation, most often in the form of livestock—although no quantitative data is available to substantiate this. These institutions are common throughout rural communities in South Sudan.

Wanjok experienced a large influx of returnees from Sudan in 2011 and the integration of returnees into social and economic life has been relatively smooth. The various forms of capital that returnees repatriate with are highly regarded by the community leaders and by the local chamber of commerce. Foreign business ownership is common in a few specific niches, such as Ugandan ownership of construction contracting companies and previously Arab-dominated trades. At the time of writing however, most economic activity was carried out by Wanjok's long-term residents and recent returnees.

Besides trade of foreign items, Wanjok is also the largest market town in Aweil East County where locally cultivated crops are sold. Unfortunately, agricultural yield often does not exceed basic subsistence levels, especially at a time when dry spells have induced harvest failures such as occurred this year. There is potential for larger scale cultivation, particularly among crops like sorghum, sesame and groundnuts. It is the County administration's ambition, in collaboration with the various international agencies active in the area, to harness the skills and capacities of the recently repatriated returnees into larger mechanised farming schemes to prevent food shortages in the future.

According to the County commissioner, the community's main demand at the moment coming out of 21 years of war and 6 years of working up to a peaceful and secure independence is for public services. The County administration is keen to prioritise its objectives and use the resources available accordingly. These objectives include improving healthcare, improving the literacy and skill sets of youths – particularly those who have never resided in an urban setting or in the North – through education and vocational training, and improving the infrastructure of the County to improve accessibility and connectivity to other markets. Food security is an overarching theme, cutting across all the aforementioned phases. Aweil East County's youth have a central role to play in sustaining this food security; they are viewed as being the workforce that will deliver the outcomes of larger mechanised or ox-ploughed commercial farming, particularly for sorghum crops.

MALUALKON

Malualkon is a town in Aweil East County, about a 45 minute drive from Aweil Town, which is the capital of Northern Bahr El-Ghazal. The overall population for Baac Payam is 79,462, with a roughly equal breakdown of males and females (38,724 males; 40,738 females).

Unlike Wanjok, Malualkon is not on the major trade route nor is it the seat of the county headquarters. In many ways, Malualkon is an artificial market created by the large and long-term presence of several

NGOs and UN Agencies choosing to base in the area, as it was consistently under SPLA control during the war and therefore not as dangerous as some other areas in Northern Bahr el Ghazal.

According to the community leaders, Malualkon is currently host to 540 returnees from Khartoum. This large influx of people has stressed the resources available to the community, including the supply of water. The differences in the access to water between long-term residents and returnees has created conflict in the area. In addition to stressing water resources, the large number of returnees has created an additional demand for goods in the market; this coupled with the closure of the border has driven up the price of supplies and reduced the availability of goods.

Currently the supply of goods provided by traders from East Africa and the North is not able to keep up with demand. Restrictions at the Northern border reduce the flow of goods and disputes over fuel tariffs limit the amount of fuel available in the area. Currently, a lack of fuel has forced the grinding mills in the area to shut down operations, thus making milled grains such as flour scarce. Additionally, there has been massive inflation in the price of goods, with some goods more than doubling in price over the last year. According to one consumer, the price of a live chicken has gone from 25 SSP to 60 SSP during this time.

Community leaders identified agriculture, fishing, and the raising of livestock/poultry as the main forms of income generating activities in the community. It is clear, however, that a large part of the economy is dependent on NGOs for work. As one community member stated, — the only way to get money is to have a son or a daughter who is employed by an NGO. A few community members have found success outside of the NGOs, but these people are traders who are reliant on porous borders to maintain their business.

3.2/SELECTED FINDINGS

The market in Wanjok and Malualkon are distinct in that Malualkon is a base for many NGOs in Northern Bahr el Ghazal. Without them, Malualkon's market would not be as developed as it is currently. Wanjok on the other hand is a focal location of different payams and neighbouring communities; its market is more organically developed. Nonetheless, the reason for high rates of dissatisfaction for imported goods is closely related to the disruption in the supply chain: the closure of the shared border with Sudan has disrupted the long established trade routes between the two former adversaries. Furthermore, the dissatisfaction regarding powdered milk implies a need to develop the State's most prominent resource: cattle.

TABLE 20: GOODS WITH HIGHEST DISSATISFACTION BY LOCATION, NBEG, 2011

Wanjok Market	Malualkon	Ariath	Gok Machar	Aweil Market
Imported Vegetables / Imported Grains 85.8% (n=54)	Flour (n=64) 95.5%	Eggs (n=52) 91.2%	Tools (n=63) 88.7%	Imported Vegetables 95.7% (n=45)
Imported Clothes 84.2% (n=53)	Imported Grains / Imported Clothes 83.5% (n=56)	Flour / Spare Parts (n=47) 79.7%	Imported Clothing 85.9% (n=61) Pharmaceuticals 84.6% (n=60)	Imported Fruit 93.6% (n=44) Imported Clothes and Footwear 89.4% (n=42)
Powdered Milk / Flour (n=52) 82.6%	Powdered Milk 73.2% (n=49)	Tools (n=46) 78.0%	Spare Parts (n=59) 83.1%	Imported Bread / Imported Grains 87.2% (n=41)
	Oil (n=46) 68.8%	Electronics (n=45) 76.3%	Local Furniture 81.7% (n=58)	

Imported clothes were identified in four out of the five locations as being one of the goods with the highest rates of dissatisfaction, and imported grains were identified in three. Coupled with the two locations that identified flour as having high rates of dissatisfaction, increasing local production of grains would help to address this difficulty. Although imported clothes had high dissatisfaction rates, locally produced clothes did not.

TABLE 21: SERVICES WITH HIGHEST DISSATISFACTION BY LOCATION, NBEG, 2011

Wanjok Market	Malualkon	Ariath	Gok Machar	Aweil Market
Restaurant 82.6% (n=52)	Restaurant (n=43) 64.3%	Boda 52.4% (n=33)	Bodas 33.8% (n=43)	Fruit and Vegetable Vendor 77.3% (n=34)
Teashop (n=42) 66.7%	Teashop (n=39) 58.2%	Dobbi (n=30) 78.9%	Motorcycle Ride 49.4% (n=40)	Photographer/ Videographer 76.7% (n=33)
Dobbi (n=28) 44.5%	Dobbi (n=36) 53.7%	Photographer 66.7% (n=28)	Restaurant 62.7% (n=32)	Rickshaw (n=32) 68.1%
Barber (n=25) 39.7%	Beautician (n=33) 48.4%	Tailor (n=27) 69.2%	Microbus (n=27) 49.1%	Blacksmith or Welder 66.0% (n=31)
Boda 36.5% (n=23)	Boda 47.8% (n=32)	Welder/Cut Fruit (n=24) 55.8%	Cut Fruit (n=24) 37.5%	Tailor (n=22) 55.0%

Services with high rates of dissatisfaction are disaggregated along urban and rural areas. Laundry (Dobbi) and restaurants in the rural areas receive low marks.

TABLE 22: LEAST CONSUMED GOODS BY LOCATION, NBEG, 2011

Wanjok Market	Malualkon	Ariath	Gok Machar	Aweil Market
Slaughtered Poultry (61.9%, n=39)	Nuts (n=34)	Local Clothing 50.7% 74.6% (n=44)	Newspapers 54.9% (n=39)	Cattle 57.8% (n=26)
Yoghurt 60.3% (n=38)	Butter (n=33)	Newspapers 59.3% (n=35)	Local Clothing 46.5% (n=33)	Accessories 53.2% (n=25)
Butter / Live Poultry 57.1% (n=36)	Spare Parts (n=31)	Accessories 46.3% 38.9% (n=23)	Machinery (n=22)	Yoghurt 44.7% (n=21)
Toiletries 44.4% (n=28)	Slaughtered Poultry (n=26)	Oil / Local Goods (n=21)	Textiles / Local Goods/Electronics 23.9% (n=17)	Bricks 41.3% (n=19)
	Live Poultry 34.3% (n=23)			Sour Milk 38.3% (n=18)

The rural nature of some of these markets explains why yoghurt for example is an under-consumed product. Similarly, textiles also are not often available specifically because of supply chain issues in this hard-to-reach State with closed off borders.

TABLE 23: LEAST CONSUMED SERVICES BY LOCATION, NBEG, 2011

Wanjok Market	Malualkon	Ariath	Gok Machar	Aweil Town
Gravel Collector (n=55)	Generator Repair (n=39)	Splitting 65.3% (n=43)	Stones Cook 79.7% (n=47)	Mechanic 59.6% (n=28)
Computer Technician 79.4% (n=50)	Plumber 56.7% (n=38)	Cook 70.6% (n=36)	Splitting Stones 70.8% (n=46)	Dairy Farm or Cattle Keeper 58.7% (n=27)
Mechanic 73.0% (n=46)	Appliance Repair (n=37)	Plumber (n=36)	70.6% Appliance Repair 66.2% (n=45)	Electrician 58.1% (n=25)
Plumber 71.4% (n=45)	Electrician 55.2% (n=37)	Mechanic (n=25)	59.5% Plumber 67.7% (n=44)	Mason or Bricklayer 51.1% (n=24)
Photographer/Construction 71.4% (n=45)	Computer Technician 53.7% (n=36)	Beautician/Messenger 42.3% (n=22)	Car Washing 53.0% (n=35)	Plumber 52.3% (n=23)

The main challenge regarding consumption of services is the undeveloped nature of the markets: few require or are able to hire the services of plumbers, generator repairers, and cooks. Much of this accommodates the challenges that stem from low levels of disposable incomes.

3.3/N. BAHR EL GHAZAL CONCLUSION AND RECOMMENDATIONS

Whereas food shortages, a lack of building materials such as cement and iron sheets, tools, and luxury items due to the official closure of trade routes into Sudan drive up prices and negatively affect many, it also creates opportunity for those with the capital and ability to supply increasing demands. There has been a remarkable trend of capital flight since the closing of the borders. According to the KCB branch in Aweil, remittances inflow versus outflow through Western Union and inter-branch transfers (transfers between KCB branches within South Sudan) nearly balances out at a break-even point, whereas inter-company transfers from business accounts (transfers between the KCB branch in Aweil and other KCB branches outside of South Sudan) are comprised of about 95% outflow. This indicates a high level of capital flight from the private sector to East Africa. How much of this capital is being used to purchase goods and transport them from Kampala, Nairobi or Mombasa is unclear. At the time of writing, transport costs for bringing a 40 tonne truck of maize flour from Kampala to Aweil town stood around 11,000 to 12,000 USD. A breakdown of charges incurred in-transit are cited in the 2010 South Sudan Cost-to-Market Report¹¹⁹, which cites that drivers are required to make a payment at nearly every stop (an average of 97% or more), with numerous checkpoints encountered (1 per 25 km on major trade routes). The analysis determined that low value cargoes pay more as a percentage of the value of goods transported: 10.3% on cargo valued 5,000 SDG or less, compared to 4.1% on cargo valued more than 50,000 SDG. Nearly half (47%) of these payments are unreceipted. Waiting time at checkpoints is significant across all routes, averaging 2 hours 9 minutes per 100 km. This illustrates the current skewed market opportunity in NBeG whereby a very small group of traders controls the dominant market share of nearly all essential food and non-food items.

Trade with Sudan is piecemeal and not comparable to the influx of goods from East Africa. Mostly Bagarra traders smuggle small quantities of petrol, wheat flour, yeast and sugar from the Sudanese border town of Meram down to South Sudanese towns like Majok Yithiou, where South Sudanese traders buy their goods and bring them to market towns such as Wanjok. Whereas before South Sudan's independence 40-tonne trucks were bringing in these items in bulk through Abyei and Darfur on a daily basis, traders are now constrained to using mainly motorbikes, bicycles and rickshaws. Because of this scarcity and the skewed market dynamics, there is a very large demand for commercialised agriculture in NBeG. Particularly crops such as maize, sorghum, sesame, groundnuts and timber are in high demand and can be cultivated locally. According to the state Chamber of Commerce and the state Revenue Authority, this sector is underdeveloped although not due to a lack of

¹¹⁹ South Sudan Cost-to-Market Report: An Analysis of Check-points on the Major Trade Routes in South Sudan” South Sudan National Bureau of Statistics 2010

skills. Many returnees from Sudan have worked in commercial farms and bring back the practical knowledge of mechanised farming. Most informants interviewed at various state departments, as well as private sector actors attribute this to an institutional deficiency; lack of support from either government, civil society or private sector, fragmented value chains, and an overall lack of business literacy, such as understanding the state's tax structures and how to access start-up capital.

In summary, NBeG is currently dealing with many challenges that all have far reaching effects for the current unpredictable market. The abrupt closing of the State's two main supply lifelines from Sudan, a large number of returnee IDPs and a failed harvest render value chains and market prices in constant flux. Blessed with a potential workforce that has acquired a variety of skills whilst residing in exile, yet unable to harness that capacity thus far in the form of organised labour, many are looking to micro-enterprise and income generation activities as a main source for economic security. Yet with an array of international organisations still in relief mode, modalities for enterprise development are scarce.

NON AWEIL TOWN MARKET RECOMMENDATIONS

Market Opportunity/Consumer Demand Based Recommendations for TVET Programme

The following recommendations assume that graduates will operate in one of the four markets within which the assessment was conducted. Program development recommendations are targeted towards vocations that exhibited opportunities for advancement and development.

- Given the high levels of dissatisfaction with oils in the market due price, **consider introducing skills training programmes in sesame and peanut oil production**. If oils are locally produced, they will be much less expensive than the ones that are imported from Uganda and Khartoum. Rudimentary grinding and extraction systems can be easily developed from local materials to extract oils from peanuts and sesame seeds (sim sim).
- To address the concerns raised about the **hygiene of meat slaughtering processes**, consider incorporating meat preservation methods into skills training programmes. If vendors can preserve the meat that they do not sell in a single day, this will decrease the number of meat related food poisoning incidences. The preservation of fish (salting, sun-drying, etc.) is very prevalent in South Sudan, so there is a foundation for extending this practice to cattle and goat meat. Salt was widely available in the market.
- To compensate for the lack of vegetables and fruits in the market during the dry season, incorporate **training in canning and preserving methods into agricultural skills training programmes**. Although there are start-up costs associated with canning and preserving, these are no more than the start-up costs for carpentry, masonry, tailoring, or agriculture businesses.
- In conjunction with other NGOs that focus on animal husbandry such as VSF (not currently in the area, but in Aweil), consider introducing **programmes that support the processing of animal products**. The demonstrated consumer demand for powdered milk could be addressed by producing more fresh milk. NBeG is well known for having a large number of cattle, so programmes that take advantage of this supply should be considered.
- Data from Aweil North markets also indicates that there is sufficient demand to introduce **catering/restaurant training** courses, however these should be linked to financial literacy and business skills training courses. Similarly, data from Maluakon and Gok Machar indicate a market opportunity for **barbers and beauticians**.

Beneficiary Needs Based Recommendations for TVET Programme

Preliminary qualitative interviews with graduates suggest that there is a discrepancy between the programme's objective to: (i) target the most vulnerable and socio-economically disadvantaged individuals from remote rural areas outside of Maluakon and Wanjok, and (ii) to train successful entrepreneurs in skills relevant for market opportunities in commercial urbanising centres. As such, disappointing success rates among graduates may be due to unrealistic expectations. Contextualising the various training programmes to the market opportunities in the vicinity of the training centre may not change the prospects for graduates enrolled from rural areas at a distance from the centre where the demand for vocational

skills is much less.

WANJOK

- There is a demonstrated need for auto/boda mechanics in the Wanjok market. Consider introducing an auto mechanics training course for youth in this area. As demonstrated in qualitative interviews that were conducted in the Wanjok market, there is a great demand for this service and a desire amongst the youth in this area to receive training in this vocation.
- Take advantage of the credit that is already being extended to consumers at restaurants in Wanjok to inform savings and credit programmes targeted at graduates of different vocational training programmes. This will help to ensure that graduates of the vocational training programs actually utilise the skills that they learn at the TVET centre. Village Savings & Loans Association could be targeted for the provision of small loans to individual TVET graduates or groups of graduates going into business together. Programmes in Aweil that provide interest free loans in exchange for collateral that is enforced by the community could also be replicated in Wanjok.
- Given that restaurants have experienced a loss in business, consider developing the production of street food in Wanjok market. Currently, street foods such as rolex, are in high demand within the market. Consider developing this market by introducing training in the production of similar street food items.

MALUALKON

- Consider re-introducing beautician training into the vocational training programme at the TVET centre. Currently, there is a demand for beauticians in the Malualkon market and current students at the TVET centre expressed a desire to receive training in this area.
- Discontinue the tailoring programme at the TVET centre. Current problems with trade routes from East Africa and Khartoum do not support a business that is reliant on imported cloth and sewing machines for operation. A complaint from current TVET tailoring students that the progress of their programme was delayed because of an interruption in the arrival of supplies; this is indicative of the trouble they will encounter when they actually try to start a business in this area. Furthermore, lessons learned from other post-conflict settings (specifically Northern Uganda) indicate that by the time tailors are trained to the level required to be competitive in the market, the availability of second hand clothes substantially reduces the amount of their business making it no longer feasible as a livelihood.
- Take advantage of the credit that is already being extended to consumers at restaurants in Malualkon to inform micro-credit programmes targeted at graduates of different vocational training programmes. This will help to ensure that graduates of the vocational training programs actually utilise the skills that they learn at the TVET centre. Village Savings & Loans Association could be targeted for the provision of small loans to individual TVET graduates or groups of graduates going into business together. Programmes in Aweil that provide interest free loans in exchange for collateral that is enforced by the community could also be replicated

in Malualkon.

AWEIL NORTH (ARIATH AND GOK MACHAR)

- There is a clear opportunity present in poultry rearing, both for the sale of live chickens and eggs. In order for poultry rearing to be a viable primary income source, training in inoculation (to prevent Newcastle disease), feeding, housing, and business is necessary for individuals to learn how to optimise their income. Additionally, a significant number of birds would need to be provided either as a starter batch or as a loan for households to be able to support themselves from poultry rearing, and a sufficient number of birds must be retained to continue poultry rearing as a business because families will sell off poultry and other livestock during periods of hardship.
- Consumer demand and potential skill background among returnees makes catering and restaurants a prime opportunity for vocational and skills training. In addition to these skills, it is suggested that bread baking be included in the training so that this complementary market demand can also be met. Restaurants and catering require relatively little capital. Rent for sufficient space for a restaurant is approximately 80 SSP per month, and various restaurant owners report needing start-up capital of as little as 300 to as much as 500 SSP. Chairs, tables, and cooking supplies are available locally, as are the raw foods necessary for food preparation. Various restaurant owners reported profits sufficient enough to support their families. Owners of mid-scale restaurants who kept track of their gross income reported bringing in over 200 SSP per day.
- Although there is a strong demand for milk and associated dairy products, such an intervention would need to be paired with veterinary outreach and training on hygienic milk processing, which is beyond the scope and capacity of the Save the Children TVET centre in Malualkon.
- There is significant consumer demand for furniture and other wood products in Aweil North. However, it should be noted that the diversity of tools needed to start a proper carpentry workshop and the high cost of raw inputs makes this field extremely difficult to ensure a successful school-to-work transition for graduates.

AWEIL TOWN

Aweil Town is the capital of Northern Bahr El-Ghazal (NBeG). NBeG is heavily reliant on agriculture and is South Sudan's most impoverished state. Despite the prevalence of agriculture, research found that the market lacks local fruits and vegetables, and market patrons reported high levels of dissatisfaction with most agriculture products. Access to supplies and materials has decreased significantly since Khartoum imposed restrictions on trade routes going from the North to the South. Our research indicates a strong need for vocational and skills training, especially among youth returnees.

Based on this assessment, the following location-specific recommendations can be made:

- Increase food security by strengthening local cultivation. Strengthen local cultivation by providing returnees and the host community with agricultural tools, seeds, and training in

cultivation techniques.

- Create employment opportunities by expanding the market and supporting small-scale businesses. Expand the market by promoting the sale and production of local goods. Support small-scale business with microfinance loans for business start-up.
- Recommended areas of skills training for women include poultry rearing.
- Recommended areas of vocational training for young men includes electronics repair such as mobile phones, radios and televisions.
- Recommendations for vocational and skills training in: cultivation, business management, simple accounting, and English. As many people are missing basic skills such as numeracy and literacy because of a poor or non-functioning educational system during the war, it is important to incorporate basic skills into all vocational training programmes to enhance the overall learning and understanding.
- It is suggested that the provision of food, childcare, and accommodation should be incorporated into all training programmes—whether this be in the form of an allowance while attending the training programme or the provision of these services and items. This will both assist in reducing the number of programme dropouts and make sure that there are fewer barriers to program entry.

04/WESTERN BAHR EL GHAZAL

Forcier Consulting conducted the *Market Assessment of Youth Vocational Training Opportunities* for IOM in Wau, Western Bahr el Ghazal.

4.1/INTRODUCTION TO ASSESSED AREAS

Western Bahr el Ghazal (WBeG) covers an area of 91,075.95 square kilometres and has an estimated population of 333,431.¹²⁰Wau is its capital, with an estimated population of 151,320 in all of Wau County.¹²¹ WBeG borders Northern Bahr el Ghazal to the North, Warrap to the East, and Western Equatoria to the South. The furthestmost northeast corner of the state (Raja County) borders Darfur.

Due to its proximity to the north, WBeG has relied on trade routes with Khartoum. Seasonal road closures between Wau and Rumbek make dependence on supply chains from Juba, Uganda and Kenya difficult. Despite this, Western Bahr el Ghazal has one of the lowest incident rates of poverty, with only 43.2% of people live below the national poverty line (compared to the national average of 50.6%). Per capita consumption in WBeG is one of the highest of all states, averaging 114 SSP per month (compared to the national average of 100 SSP per month), and a higher than average literacy rate with 35% of the population over the age of six able to read and write (compared to the national average of 28%).¹²²

WAU

Wau is located on the banks of the Jur River in Wau County, Western Bahr el Ghazal State in northwestern South Sudan. The capital of Western Bahr el Ghazal, Wau is approximately 650 km north of Juba by road. Wau covers an area of 19,251 sq km, and has a total population of 151,320.¹²³ The population consists of 70,539 males, 80,781 females, and 29,614 households.¹²⁴

According to the Southern Sudan Relief and Rehabilitation Commission (SSRRC), 1,812,300 internally displaced people and refugees returned to South Sudan between 2004 and 2008.¹²⁵ During the same period, 60,000 IDPs and refugees returned to Western Bahr el Ghazal State.¹²⁶ From October 2010 – January 2012, Western Bahr el Ghazal received a total of 20,751 returnees, of which 18,319 were received in Wau.¹²⁷ The total number of returnees in Wau and WBeG overall from January 2011 – January 2012 are 13,731 and 14,811, respectively.¹²⁸ More than half of returns to Wau have been spontaneous; in the past year alone, only 3,832 returnees to Wau took part in a government-organised migration.

In 2009, there were 26,966 farming households in Wau cultivating a total area of 23,730 (ha). Gross cereal production in 2009 was 29,508 tonnes and net cereal production totaled 23,607 tonnes. Community leaders interviewed identified the main agricultural outputs as sorghum (*dura*), cassava,

¹²⁰ “Statistical Yearbook of Southern Sudan 2010”, Southern Sudan Centre for Census, Statistics and Evaluation.

¹²¹ Ibid.

¹²² Ibid.

¹²³ “Statistical Yearbook of Southern Sudan 2010”, Southern Sudan Centre for Census, Statistics and Evaluation.

¹²⁴ “Statistical Yearbook of Southern Sudan 2010”, Southern Sudan Centre for Census, Statistics and Evaluation.

¹²⁵ “Statistical Yearbook of Southern Sudan 2010,” Southern Sudan Centre for Census, Statistics and Evaluation. 103.

¹²⁶ Ibid.

¹²⁷ “IOM-ERS Weekly Update, IOM-South Sudan, 11-17 January 2012,” International Organization for Migration. 14.

¹²⁸ Ibid. p.11

groundnuts, and sim-sim (sesame). Current agricultural output remains low and continues to be impacted by a lack of funding and materials, large-scale agricultural projects, and livestock herding. The Wau County Department of Agriculture Deputy Director indicated that a high demand exists in Wau for large-scale agricultural projects (i.e., irrigation projects; clearing land for farming), high-scale farming tools (tractors), and materials. Faced with funding shortfalls, the Department of Agriculture currently assists local producers in identifying fertile areas and distributes any seeds that are received from NGOs operating in the area. Even when fertile land is available, many local producers' efforts at farming are hampered by the movement of livestock. The Payam Administrator reported that the cattle herders are destroying crops and trampling the land, causing fertile soil to wash away during the rainy season.

Moreover, complaints about crop destruction have resulted in violence, deaths, and villagers abstaining from further efforts at cultivating the land. Chiefs interviewed stressed the need for funding and training for agricultural projects, particularly irrigation techniques. The Payam Administrator also touched upon the lack of seed diversity and availability of tools, namely that the civil war destroyed many seed variations and also hampered the ability of local producers to cultivate long-term crops like sorghum. Local producers in Wau are forced to farm without the benefit of tractors and rely primarily on imported tools, as few blacksmiths are available.

In terms of existing organisations working on agriculture, the Deputy Director noted that agricultural committees exist throughout the state acting as coordinators between the Ministry and local farmers. While there are currently no agricultural cooperatives, in the past agricultural committees have started project in which multiple committees work together. Also, FAO and Sudan Productive Recovery Programme (SPCR) have built offices and provided training programs to farmers and the broader community.

The Acting Director of Fisheries at the Wau County Department of Animal Resources reported that there is overfishing in the area and catches are decreasing as a result. The Department coordinates with NGOs and fisheries groups on training programmes focused on net braiding and fish processing and these have been useful for the community. Additional training programmres are still needed, as the Department was not able to reach communities in Juriba and parts of Wau County. Fish farming does not exist in the area and efforts to implement it among the community thus far have been unsuccessful. As with the agricultural sector, there is a need for equipment; in Wau, the Acting Director noted that some communities are lacking proper fishing nets. SPRPC, HARD, WATAP (Women Training and Promotion Group) have formed groups and undertaken plans for training. Community leaders interviewed reported on the lack of blacksmiths in the area, as well as the unavailability of iron materials due to disruptions in supply lines.

4.2/SELECTED FINDINGS

All respondents were consumers of local fruit, local vegetables, nuts, local grains, flour, fresh milk, and imported fruit. Conversely, respondents were least likely to report being consumers of yoghurt (52.4%, n=33 non-consumers), toiletries, rolexes (both 47.6%, n=30) and spare parts (44.4%, n=28).

Respondents indicated the highest levels of satisfaction with nuts (76.2%, n=48), and local vegetables (76.2%, n=48). These were also some of the goods most often observed in the market, although nuts are confined to groundnuts, and there are also few varieties of vegetables available at any one time. The highest levels of dissatisfaction were reported for imported clothes (76.2% n=48), imported fruits (82.5%, n=54), poultry meat (79.4%, n=50), and imported grains (74.6%, n=47). As imported fruits are both the products with the highest levels of dissatisfaction and a product that all respondents reported buying, it is worth further investigation which fruits are imported, and why they are imported rather than being produced locally—this is a market with a large growth potential.

BOX 7: GOODS WITH HIGHEST DISSATISFACTION, WAU, 2011

Imported Fruit (82.5%, n=54)
Slaughtered Poultry (79.4%, n=50)
Imported Clothes (76.2%, n=48)
Imported Grains (74.6%, n=47)
Packaged Juice (69.8%, n=44)

By far the most common reason for dissatisfaction was that goods were too expensive. This is likely a consequence of the long distances goods have to travel to reach Wau, and the fact that three out of the

BOX 8: SERVICES WITH HIGHEST DISSATISFACTION, WAU, 2011

Hiace (50.8%, n=32)
Restaurant (50.8%, n=32)
Cut Fruit & Vegetables (50.8%, n=32)
Water Collection (47.6%, n=30)
Construction (39.7%, n=25)

four items with the highest levels of dissatisfaction are imported rather than produced locally. Producing such goods locally would both lower the price and make the supply more reliable. Poultry meat is one item that is produced locally, but observations in the market found that this is a very rare item to find, and

that even in this case much of the produce is imported from Uganda. This combined with relatively high levels of dissatisfaction for live poultry (57.1%, n=36) and eggs (50.8%, n=32) indicated that poultry keeping is a livelihoods area primed for intervention.

The most common reason for dissatisfaction with services was that there were not enough of them, particularly for restaurants, where 64% of those dissatisfied (n=18) cited this as their primary reason for dissatisfaction. These high levels of dissatisfaction due to lack of service providers demonstrates that there is considerable room for expansion of these service industries, particularly restaurants. In contrast to reasons for dissatisfaction with goods, services being cited as too expensive was not a common or significant complaint. Poor hygiene was a common complaint in the catering services, with 18% (n=5) for restaurants and 16% (n=5) for cut fruits and vegetables.

Respondents were also asked to indicate their level of satisfaction with several services available in the Wau market. Respondents were less likely to use services than they were to have bought particular goods, with 13 out of 25 services having fewer than 60% of respondents reporting ever using them. Due to the high levels of non-consumers, there were few services that had extremely high levels of either satisfaction or dissatisfaction.

TABLE 24: GOODS & SERVICES LEAST CONSUMED, WAU, 2011

Goods	Services
Yoghurt 52.4% (n=33)	Computer Technician / Caterer 55.6% (n=35)
UHT Packet Milk 49.2% (n=31)	Beautician / Rolex 54.0% (n=34)
Toiletries / Rolex 47.6% (n=30)	Plumber 52.4% (n=33)
Spare Parts 44.4% (n=28)	

The services that people were most likely to have used were teashops, water collectors, tailors, and restaurants (all 98.4%, n=62), and most likely to be non-consumers of beauticians, rolexes (both 54.0%, n=34), caterers and computer technicians (both 55.6%, n=35). Respondents were most satisfied with teashops (65.1%, n=41), tailors (63.5%, n=22) and photographers (54.0%, n=34), and were most dissatisfied with fruit and vegetables, hiaces, and restaurants (all 50.8%, n=32). As restaurants were both used by almost all respondents and had high levels of dissatisfaction, this is an area with good opportunities for new entrepreneurs.

4.3/W. BAHR EL GHAZAL CONCLUSIONS & RECOMMENDATIONS

It is important to keep in mind when synthesising this information for the creation of vocational and skills training programmes, that Wau is a much larger and more competitive market than most rural areas in South Sudan—and even most state capitals. As demonstrated in the consumer demand section of this report, with regards to several goods and services, consumers *are* satisfied. In most markets, there is a variety of goods and services which consumers report as unavailable or of low quality, which is not necessarily the case with Wau. Therefore, vocational training programmes not only need to train individuals in crafts and trades, but also the necessary skills to be competitive in the market.

Based on these observations and comparisons with other markets in South Sudan and the data contained herein, the following recommendations can be made for the creation of vocational training programmes for youth in Wau, Western Bahr el Ghazal:

- Based on consumer demand and market opportunity, the areas most suitable for vocational training (assuming graduates plan to operate in Wau) are agriculture, poultry-raising, and advanced catering. With regards to catering, it is crucial that training move beyond street foods such as chicken, chips & rolex and emphasise hygienic preparation of food.
- Any training programme should include a strong component including financial literacy, business management, marketing, and account/record keeping.
- There is a strong demand for agricultural products in Wau and the surrounding areas (particularly Aweil and Northern Bahr el Ghazal generally). It is recommended that programmes focus on training in horticulture and agriculture, with the specific aim of increasing fruit and vegetable production, to supply Wau and the surrounding markets.
- Supply chain logistics between Wau, surrounding rural areas, and Aweil should be explored and prioritised so that businesses can begin to service consumers beyond the immediate

market.

- Feasibility of fish farming should be explored in conjunction with the Ministry of Animal Resources & Fisheries to build upon existing small businesses operating in this sector and expanding opportunities for entrepreneurship.
- As an Arabic-pattern state, several youth (particularly those who migrated from North Sudan or Darfur) have limited English skills. This presents a significant barrier to education, work and entrepreneurship. Therefore, it is recommended that English courses be offered alongside any skill training programs.
- Existing vocational training programmes should be monitored for successes and lessons learned. IOM should facilitate the establishment of a tracer system for graduates for these institutions, as well as any new programmes that may begin.
- There is a need to provide graduates with start-up capital in order to ensure they are able to successfully complete the school-to-work transition. Micro-savings groups as piloted by other organisations as well as village savings & loans programs should be considered alongside skills training.



Part IV:
Greater Upper Nile
Market Profiles

<u>Upper Nile</u>	<u>Jonglei</u>	<u>Unity</u>
Nasir		
Ulang	Bor	Rupkona
Panyikang		
Bentiu		

01 / UPPER NILE STATE

Forcier Consulting conducted two main assessments that involved locations in Upper Nile State. UNIDO sponsored the *Market & Livelihoods Assessment* that covered areas outside of the capital city: Nasir, Ulang, and Panyikang. UNHCR sponsored a *Labour Market Assessment & Vocational Training Opportunities Study*, which among other locations, included Malakal, the State capital.

1.1 / INTRODUCTION TO ASSESSED AREAS

Located in northwestern South Sudan along the border with Ethiopia and Sudan, Upper Nile State has a population of approximately one million people covering a total area of 77,283 square kilometres. Upper Nile's strategic location and oil reserves, along with a history of intertribal cattle raids and competition for scarce resources, have contributed to instability and a significant influx of refugees. In 2001, an estimated 8% of all conflict incidences in South Sudan occurred in Upper Nile State, and an average of 1,000 refugees from conflict-stricken Blue Nile arrived daily during December 2011.^{129, 130} More recently, approximately 100,000 cows were stolen from Lou Nuer in Upper Nile during a two-day raid by Murle from Jonglei State; more than 200 people died in the raid and hundreds were abducted.¹³¹

The principle tribes in Upper Nile State include the Shilluk, Dinka, Jinka Nuer, Gajaag Nuer, Berta, Burun, Dajo, Mabani, and Koma, though additional nomadic groups – particularly Sudanese Arabs and Ethiopians – are present.^{132, 133} The climate and geographical setting of Upper Nile State is characterized by lowland flood plains and the River Sobat and Nile zones; in addition to crops and livestock, fishing and harvesting of wild foods also contribute to livelihoods and food consumption. Despite insecurity and competition over scarce resources, Upper Nile has the lowest incidence of poverty in South Sudan (25%) and the highest rate of consumption per person (144 SSP compared to the national average of 103 SSP per month).¹³⁴ While there exists considerable potential for oil revenues to help spur infrastructural development in the state, the resettlement of over 165,900 refugees and internally-

¹²⁹ South Sudan Consolidated Appeal, OCHA, 18 (docs.unocha.org/sites/dms/CAP/CAP_2012_South_Sudan.pdf)

¹³⁰ SUDAN-SOUTH SUDAN: Refugees stream into Upper Nile state (<http://www.irinnews.org/Report/94472/SUDAN-SOUTH-SUDAN-Refugees-stream-into-Upper-Nile-state>)

¹³¹ <http://timelinesdb.com/listevents.php?subjid=1492&dayinhist=0&date1=-9999999999&date2=9999999999&words=&title=South%20Sudan&fromrec=120>

¹³² Resident Coordinator Support Office, Upper Nile State Briefing Pack (unmis.unmissions.org/Portals/UNMIS/Referendum/Upper%20Nile.pdf)

¹³³ <http://www.ssddrc.org/states/upper-nile.html>

¹³⁴ Statistical Yearbook for Southern Sudan 2010, 124 (<http://snbs.org/statistical-year-book/>)

displaced persons (IDPs) since 2004 has exacerbated the weak infrastructure in the area, emphasizing the already limited efficacy of local government and aid agencies.^{135,136}

Upper Nile also has a comparatively high rate of individuals living in urban areas — a full 25% — which may account for a relatively high rate (50%) of individuals who have received some schooling in their lives and the lowest rate of illiteracy (55%) for individuals aged 15 and older. Regarding health, Upper Nile is the epicentre for kala azar (Leishmaniasis),¹³⁷ despite having the second highest rate (87%) in access to health care. Seventy-five per cent of households own mosquito nets, and while maternal mortality rates are marginally higher than the national average of 2,054 deaths per 100,000 births, under-5 mortality rates are slightly lower than nationwide averages.

MALAKAL

Malakal Town is located on the banks of the White Nile in Malakal County, Upper Nile State, approximately 650 km northeast of Juba by road. The population of Malakal County is 126,483.¹³⁸ The dry season in Malakal County typically begins in November and lasts until April. The rainy season spans from May to October and normally deposits sufficient amounts of rainfall to sustain agricultural practices. The majority of residents are from the Shilluk, Dinka and Nuer ethnic groups. Since independence many people from the North have left the area, leaving behind many empty shops and businesses. Since the 1980's, Malakal town and surrounding areas has been subject to civil insecurity and much of the population has been dislocated. In November 2006 there were local clashes that resulted in a number of deaths—exact numbers are unknown—and some households fled from town to neighbouring countries. Conflicts and insecurities in the area continue to impact the lives of the people in Malakal Town, affecting trade and access to markets. Community leaders interviewed stated that commodities and services are available in Malakal town but these livelihoods are not currently reliable sources of income.

NASIR COUNTY

Nasir County is situated in southeast Upper Nile State and has a population of 210,002 with 29,703 households.¹³⁹ The county is divided into eight payams with households spread throughout the county, though there is a tendency of clustering around the payam centres. The administrative headquarters of Nasir County is Nasir, which is located on the banks of the Sobat River and is approximately 250 kilometres from the state capital of Malakal and 30 kilometres from the border with Ethiopia. Nasir's population of 43,733 residents consists of 23,982 males and 19,751 females spread across 5,532 households.

¹³⁵ Ibid

¹³⁶ Statistical Yearbook for Southern Sudan 2010 (<http://ssnbs.org/statistical-year-book/>)

¹³⁷ <http://www.doctorswithoutborders.org/news/country.cfm?id=2369>

¹³⁸ Southern Sudan Centre for Census, Statistics, and Evaluation, *Statistical Yearbook for Southern Sudan 2010*.

¹³⁹“Statistical Yearbook of Southern Sudan 2010,” Southern Sudan Centre for Census, Statistics and Evaluation. 15.

The area has a rich clay soil that is well suited for agriculture and the main crops include grains like maize, millet, and sorghum, as well as onions, pumpkin, kuthra (similar to okra), and potatoes. Fishing also serves as a main source of livelihood for households living by or near to the Sobat River.

Throughout Nasir County, access to basic services such as education, health, and water and sanitation is very limited. Médecins Sans Frontières (MSF) operates a hospital in Nasir alongside a government-run public health care centre. Together, these two facilities serve the entire county, as there are no medical facilities outside the headquarters. There are very few boreholes and the majority of the population uses the river as their main water source. In terms of education, only three schools are operational in the county and the highest level is Primary 8. The limited NGO presence in Nasir includes MSF, the Adventist Development and Relief Agency (ADRA), and the Upper Nile Kalaazar Eradication Association (UNKEA); UN agencies like the World Food Programme (WFP) have also been active in the area.

The road network is poor throughout the county and only dirt paths are available for use during the dry season. During the rainy season, travel is largely limited to the Sobat River as the roads are largely impassable. A small airstrip is present, though it is only serviced by the United Nations Humanitarian Air Service (UNHAS) and currently flights only land once per week. MTN and Zain provide mobile phone services, though these are often unreliable or provide poor connections.

There is a mid-sized market in the centre of Nasir, though the availability of goods and the economic opportunities present for those in surrounding areas are limited. The heavy reliance on imports makes the market vulnerable to shocks affecting the supply chain, such as the recent closing of the border to Sudan, increased taxes, and the deterioration of roads during the rainy season. In general, very few items are available for purchase and prices are severely inflated—particularly now that Sudan has restricted the export of goods to South Sudan and because most imports for the Nasir market now arrive from Ethiopia. Additionally, Nasir County experienced a food shortage emergency during the observation period as a result of insufficient harvest yields in 2011.

Currently, the main source of insecurity in Nasir stems from violent cattle raids between the Jikany Nuer and neighbouring Lou Nuer and Murle. Historically part of some cattle cultures in South Sudan, the frequency and intensity of cattle raids have been exacerbated by a prevalence of small arms and few opportunities for sustainable income-generating opportunities. Cattle raids become more likely to occur during the dry season, when pastoralists compete for access to grazing pastures and water sources. Raids are retaliatory in nature, and often include the abduction of women and children.

ULANG COUNTY

Ulang County is nestled in southeastern Upper Nile State, bordering Nasir and Baliet Counties, Jonglei State, and Ethiopia. Comprised of four payams – Ulang, Doma, Kurmuot, and Yomding – Ulang County has a total population of 85,044 of which 48,202 males and 36,842 females are spread across

11,815 households.¹⁴⁰ The administrative headquarters of Ulang County is Ulang, a small village situated on the Sobat River of approximately 18,810 residents. The Sobat River divides Ulang and while there are a few households clustered near the city centre, most tukuls are spread throughout the county. There is a small market in the town centre with a few permanent structures, one of which includes the office for the County Commissioner. As with many areas in South Sudan, the closure of the border with Sudan and subsequent cessation of imported goods has inflated the price of goods and services available in the market; during the observation period, a 90kg sack of durra could be purchased in Ulang for as much as 450 SSP.

As in neighbouring Nasir County, the majority of residents in Ulang County are pastoralist Jikany Nuer. Of the approximately 11,800 households in Ulang, 9,437 households were farming a total area of 5,946 (ha) in 2009 with an average of 0.63ha per household.¹⁴¹ During the same year, gross cereal production was 2,844 tonnes and net cereal production was 2,275 tonnes.¹⁴² Ulang's principal agricultural outputs are tomatoes, eggplant, cabbage, okra, and onions although harvest yields are not sufficient to export outside the county. Given the proximity of the Sobat River, fishing provides a significant source of food and income for households in Ulang. Since the end of the civil war, residents have been able to resume fishing as a livelihood and government estimates suggest that approximately 3,000 fish are caught daily and sold predominantly in the county market. Government officials believe that hauls could be increased with improved equipment, training, and support. However, unemployment rates are at a critical level, and aside from government posts and lucrative – but rare – NGO positions, there remain few income-generating opportunities outside of fishing, farming, livestock keeping and tree cutting.

Ulang remains severely underdeveloped, both in terms of social services and infrastructure. There are few boreholes, schools, clinics, or other basic services available and there is a very limited NGO presence. Currently, the Irish NGO GOAL operates a compound in Ulang, implementing healthcare as well as water and sanitation programmes. However, the closest hospital, which is operated by Médecins Sans Frontières, is located approximately 1½ hour away by car in Nasir. Primary school enrolment in 2009 for Ulang County included 13,888 boys and 9,183 girls, and of children aged 6-13, 17,790 were enrolled in primary school in 2009 or 80% of the total 6-13 population.¹⁴³ However, of the 46 schools present in Ulang County, only 3 schools are equipped with toilet facilities and 5 with access to water.¹⁴⁴ Due to insufficient school buildings, many pupils are schooled outdoors and are frequently forced to abandon their lessons during the rainy season. As with most of South Sudan, enrolment for female students remains low due to adverse parental influence and a lack of incentives or understanding of a girl's right to education. In addition, both teachers and community leaders have noted that the current salary of 250 SSP per month is not sufficient to either recruit or retain qualified

¹⁴⁰ "Statistical Yearbook of Southern Sudan 2010," Southern Sudan Centre for Census, Statistics and Evaluation. 16.

¹⁴¹ "Statistical Yearbook of Southern Sudan 2010," Southern Sudan Centre for Census, Statistics and Evaluation. 88.

¹⁴² "Statistical Yearbook of Southern Sudan 2010," Southern Sudan Centre for Census, Statistics and Evaluation. 93.

¹⁴³ "Statistical Yearbook of Southern Sudan 2010," Southern Sudan Centre for Census, Statistics and Evaluation. 53, 58.

¹⁴⁴ "Statistical Yearbook of Southern Sudan 2010," Southern Sudan Centre for Census, Statistics and Evaluation. 70.

staff, leading many to leave the profession in search of more lucrative NGO positions where salaries might be double of what can be earned in government employment.

Access to Ulang and most areas of the county is limited, as the existing road infrastructure is poor and there is no functional airstrip in the surrounding vicinity. Although the government has recently constructed a road connecting the county to the state capital of Malakal, the severity of the rainy season renders dirt roads impassable. As such, boats are the only means of transportation during the rainy season, with fares upwards of 50 SSP just to reach nearby Yomding. Communication systems are limited, as mobile service providers are not present and Internet is only accessible in the County Commissioner's office.

The county has recently received an influx of armed and displaced Lou Nuer – historically rivals of the Jikany Nuer – as a result of inter-tribal violence occurring in Jonglei State. The arrival of the Lou Nuer has increased tension and insecurity in the area, as recently disarmed Jikany Nuer have expressed fears of cattle raiding by the Lou Nuer.¹⁴⁵ Insecurity is likely to intensify, as government officials deployed 15,000 SPLA troops in March 2012 to Jonglei State for the start of a disarmament campaign.¹⁴⁶

PANYIKANG

Administered from its headquarters in Tonga, Panyikang County spans an area of over 5000 square kilometres and hosts approximately 45,000 residents.¹⁴⁷ It is located in the far west of Upper Nile state, bordering Jonglei to the south, Unity to the west and Sudan's Southern Kordofan to the north. The population of the county incorporates many recent returnees, as well as Darfuris, who are estimated to comprise up to 80% of the traders in larger market areas.

Prior to independence, the county relied overwhelmingly on goods originating in Khartoum, but since the country's separation from the north and the subsequent severance of trade with Sudan, the county has been forced to shift its focus to goods brought by river from Juba or by road from Malakal. As a result, many of the goods previously procured from the north are no longer available to the county, or can be obtained at excessively inflated prices, seriously impacting livelihoods dependent on these supplies. Staples in the markets include sorghum, sugar, onions and salt, although a lack of supply forces prices above the means of many consumers. With a sack of sorghum retailing at 360 SSP (and up to 450 SSP during the wet season), these prices are simply out of reach for many of the inhabitants.

The primary sources of income-generation across the county of Panyikang include agriculture, livestock, grass cutting, charcoal, firewood, and fishing, although unemployment remains extremely high. A lack of basic equipment, such as fishing rods and hooks also hinders those wishing to engage in these industries. Unemployment is marginally alleviated in the county headquarters of Tonga, where a small number of citizens are engaged in government work, although the vast majority still have no occupation. In smaller locations such as Pakwar and Dolieb Hill, no salaried positions are available at

¹⁴⁵ "Arrival of armed Lou Nuer in Upper Nile raises concerns," United Nations Mission in South Sudan. 18 February 2012.

¹⁴⁶ "President Kiir opens disarmament in troubled Jonglei," Sudan Tribune. 13 March 2012.

¹⁴⁷ "Statistical Yearbook of South Sudan 2010," Southern Sudan Centre for Census, Statistics and Evaluation, Population and Demography"

all.

Agricultural output in the area remained low this year due to heavy rains, increasing the county's dependence on grain transported from Malakal and Renk and exacerbating food insecurity. However, the County Department of Agriculture maintains that the county hosts favourable conditions for agriculture, conceding however that training is required to maximise this potential and suggested a seed bank and instructing farmers on how to improve rates of germination. Despite a will to assist local growers through the delivery of training, tools and seeds, the County Department of Agriculture is currently lacking funds to deliver this support. Norwegian People's Aid (NPA) has been involved in some work in the area, although success rates were reportedly low due to the floods that destroyed crops before they could be harvested.

The County Department of Agriculture reports that NPA were involved in the distribution of loans, but the programmes was not sufficiently extensive to meet needs. A large percentage of the community also engage in fishing, selling tilapia and Nile perch in small markets alongside the river or in Tonga town market. The County Department of Animal Resources and Fisheries in Tonga reports receiving little support from the central government for aiding this industry, despite expressing a desire to train fishermen and provide fishing materials. No funds have been received from GoSS for some time. The department did, however, attest to implementing restrictions on the size of holes in the nets used, aiming to assist in the regeneration of fish populations along this stretch of river. Optimism still runs high for the large fishing industry in the area and its potentially high yields.

Currently, no international agencies have engaged in increasing youth livelihood in the county, nor any microfinance organisations. World Vision has previously been active in Tonga, establishing a health unit, contributing medicine, providing agricultural training and erecting water filters and latrines, although they have now not been present for over a year. Norwegian People's Aid (NPA) were also involved in the construction of a hospital but this programme has also now terminated. Youth Agencies for Relief, Rehabilitation and Development of South Sudan (YARRDSS) has been operational in Dolieb Hill since 2007. Working in partnership with CARE International and with CIDA funding, its main focus is on food security, although in addition to nutritional projects such as seed distribution, this CBO also runs a Village Saving Loan Association (VSLA) project in both Dolieb Hill and Pakwar. This project is for women only and opens with the provision of a three-day training course on savings. The participants then proceed to regularly contribute money for a fixed period; for example, twelve months. During that period, anyone within the group can borrow funds from the group total, to be paid back at the end of one month with an interest fee. At the end of the allotted period, each member has their contribution returned, plus interest generated from the loans. YARRDSS is also involved in peace-building activities, having organised a committee comprising teachers, farmers, VSLA members and others from the village. Training is conducted on how to resolve problems through discussion and a peace club is run in schools as a forum for the discussion of peace.

1.2/SELECTED FINDINGS

TABLE 25: TOP FIVE GOODS FOR DISSATISFACTION BY LOCATION, UPPER NILE 2011-2012

Malakal	Nasir	Ulang	Panyikang
		Slaughtered Poultry 32.5% (n=27)	Straw Products 100.0% (n=117)
Flour/Fresh Local Bread/Sugar/Yoghurt 69.0% (n=49)	Local Clothes/Toiletries/Imported Grains 100.0% (n=90)	Sewing Cloth / Second hand Clothes 28.9% (n=24)	Local Clothes/Imported Clothes 87.2% (n=102)
		Live Poultry /UHT Packet Milk/Prepared Food 27.7% (n=23)	Sewing Cloth 85.5% (n=100)
Local Fruit 63.4% (n=45)	Sewing Cloth/ Prepared Food 98.9% (n=89)		Bread 81.2% (n=95)

Textiles in the form of clothes and cloths are goods that have high levels of dissatisfaction associated with them, particularly in the rural areas. These stem primarily from severe supply chain obstacles. Although tailor training is often considered a wholesome objective to assist in levelling the market playing field for cloth and textiles, the greater barrier currently is the lack of importing textiles into the area. This is most likely due to the closing of the border with Sudan and, in the rainy season, severe transport restrictions over land due to impassable roads.

In Panyikang specifically, all respondents expressed dissatisfaction with straw products, which is likely due to supply; this therefore provides a mechanism of where to target efforts: harvesting more or better straw there specifically is a direct response to the levels of dissatisfaction expressed regarding the good, especially because of the supply chain issues.

Finally, grains and staples are also associated with high levels of dissatisfaction.

TABLE 26: TOP 5 SERVICES FOR DISSATISFACTION, UPPER NILE, 2011-2012

Malakal	Nasir	Ulang	Panyikang
Rickshaw 63.4% (n=45)	Beautician 83.3% (n=75)	Restaurants /	Tailor 80.3% (n=94)
Restaurant 45.7% (n=32)	Tailor 82.2% (n=74)	Photographer 34.9% (n=29)	Barber 67.5% (n=79)
Tea Shop Vendor 42.9% (n=30)	Blacksmith 75.6% (n=68)	Cut Fruit and Vegetables /	Restaurant 65.8% (n=77)
Water Collector /	Wood Collector 57.8% (n=52)	Teashop 18.1% (n=15)	Beautician/Blacksmith 59.8% (n=70)
Mobile Phone Repairer 40.8% (n=29)	Teashop 50.0% (n=45)	Appliance Repair 15.7% (n=13)	

Unlike in rural Central Equatoria, where there is a need for blacksmiths but training them would be counter-productive due to its proximities to a cheap supply in Uganda, Upper Nile is much more isolated. For this reason, vocational training of blacksmiths would be productive in maintaining tools and tackling current market inefficiencies—and improving services generally. Furthermore, developing and optimising restaurants and teahouses is also an implied need, especially in Malakal.

TABLE 27: TOP 5 UNCONSUMED GOODS, UPPER NILE, 2011-2012

Malakal	Nasir	Ulang	Panyikang
Spare Parts for Bikes, Bodas and Cars 82.1% (n=55)	Accessories 97.7% (n=88)	Nuts 60.2% (n=50)	Yoghurt 70.1% (n=82)
Locally Produced Cement Blocks 73.9% (n=51)	Charcoal 43.3% (n=39)	Spare Parts 84.3% (n=70)	Spare Parts 59.0% (n=69)
Bricks 73.5% (n=50)	Spare Parts 40.0% (n=36)	Packaged Juice 59.0% (n=49)	Toiletries 47.0% (n=55)
Locally Made Metal Goods and Metal Furniture 72.9% (n=51)	Slaughtered Poultry 37.8% (n=34)	Rolex 56.6% (n=47)	Butter 40.2% (n=47)
Seeds for Farming 67.1% (n=47)	Tools 31.1% (n=28)	Live Poultry 53.0% (n=44)	Rolex 31.6% (n=37)

It is harder to discern conclusive trends regarding goods that receive high rates of dissatisfaction. Spare parts are consistently associated with low satisfaction levels, which is another reason why more and better blacksmiths are warranted.

TABLE 28: TOP 5 UNUTILISED SERVICES, UPPER NILE, 2011-2012

Malakal	Nasir	Ulang	Panyikang
Dairy Farmer or Cattle Keeper 94.4% (n=67)	Hiace 86.7% (n=78)	Boda Bodas 69.9% (n=58)	Plumber 80.3% (n=94)
Mason or Bricklayer 91.4% (n=64)	Boda Bodas 82.2% (n=74)	Mechanic 67.5% (n=56)	Gravel Collector 77.8% (n=91)
Mechanic 84.5% (n=60)	Cut Fruit and Vegetables 81.1% (n=73)	Photographer 65.1% (n=54)	Computer Technician /Mechanic 76.9% (n=90)
Construction Worker 81.7% (n=58)	Computer Technician 78.9% (n=67)	Computer 62.7% (n=52)	
Fruit and Vegetable Vendor 78.9% (n=56)	Gravel Collector 78.9% (n=71)	Electrician / Hiace / Gravel Collector 61.4% (n=51)	Boda Bodas 75.2% (n=88)

Discrepancies become apparent when dividing Upper Nile State’s findings along rural and urban sectors: transport options are significantly underutilised. Services that relate to “parts” (spare parts) are therefore supply limited, restricting services like the afore-listed computer technicians, gravel collectors, mechanics, etc. Even Malakal faces these supply-chain hurdles.

1.3/UPPER NILE STATE CONCLUSION & RECOMMENDATION

The main complaints expressed by respondents regarding goods and services available in Upper Nile State were that they were too expensive. Due to the closing of the border with the North, trading routes that feed Upper Nile State now come through either Juba or from Uganda and Kenya, which is very costly and slow. This has driven up the price of goods across the state and also caused difficulties in providing a reliable flow of goods, making it very hard for stall owners to generate sufficient amounts of income or to plan for the future. It is crucial that any vocational training programmes put into place take this into account, as given the current political climate this is a problem that is unlikely to be resolved in the near future. Skills that require materials, such as tailoring, are therefore less suitable for this area at the moment.

This report also finds that the highest levels of satisfaction for consumers are for locally produced goods. Despite this, few goods are currently produced locally, and there is therefore a gap in the market. Respondents to qualitative interviews complained of a lack of food security, and it is therefore suggested that training in agricultural skills will both address a pressing need for the community and

contribute to improving the market. Vegetable growing was seen as being a skill that woman could learn, improving the food available for their families and also providing them with surplus, which could be sold for cash. In addition, other options such as poultry keeping should be explored. This area also has a river, and fishing is therefore an important livelihood activity for many. Supporting the local government ministries in helping train fishermen whilst ensuring the sustainability of the local fish population is therefore another area it would be beneficial to develop.

In addition to skills training, many respondents also indicated a desire to receive more academic training, such as business skills, numeracy, literacy and English. As the majority of residents were schooled in Arabic, they have no knowledge of English. Given the re-establishment of trade routes through English-speaking countries this puts them at a disadvantage, and English lessons will therefore be useful for entrepreneurs. Given the low rates of access to education across South Sudan, and the particular disadvantage women have in this context, many people would benefit from basic numeracy skills in order to help them manage a small business. Microfinance and micro savings schemes are also recommended, as very few of them exist at present in the areas researched. Furthermore, a lack of capital was cited as the main barrier to starting up a business, suggesting that the provision of microfinance loans could be useful in seeking to reinvigorate the market and lessen barriers to start-up businesses, as well as providing an introduction to basic financial skills and bookkeeping.

- As in many areas of South Sudan, poor road conditions hinder the movement of people and goods. Investments in road infrastructure would greatly benefit Malakal and surrounding areas.
- Vocational and skills training programs should focus on and encourage the production of local goods (particularly food items), both to address the shortfall in commodities since the North closed trade routes to the South and also to increase overall self-sufficiency and sustainability in the community.
- Training programs should incorporate literacy and numeracy instruction – particularly those that target women and girls given the historical absence of educational opportunities for this demographic, as well as the on-going challenges present for young girls seeking education.
- For individuals that have already acquired some skills or business activities, small business loans and microfinance schemes would provide necessary assistance to help expand or restart employment activities.
- For those areas with rivers, fishing is also an important industry, although it has for a long time received little investment and funding support. Optimism still runs high for the large fishing industry in the area and its potentially high yields and this area could well be targeted for further development.
- It is rare for apprentice-style training to occur within the market, meaning skills are often not transferred or maintained within a small family business. If funding for incentives could be found for an informal apprentice scheme, the community would see a greater retention and sharing of skill sets.

MALAKAL COUNTY

- The returnee community is facing issues with water, sanitation, shelter and food. Any vocational training program implemented will need to take into account the living situation of the returnees.
- Many of the returnee men and women already have training in teaching, cultivation, cooking and various trades but do not have access to the market to find employment or they do not have the start-up capital to start a business. Programmes should provide the support required to open up new businesses and also create employment opportunities in the community.
- There should be an emphasis on the production of local goods, especially vegetables, grains and animal rearing. Training in these sectors would provide employment opportunities for the returnee community and would benefit the whole community by improving food security.
- Training of taxi drivers and rickshaws, along with the provision of capital to buy or rent these vehicles, would be recommended.
- According to the findings, there is a general lack of and dissatisfaction with bakeries, blacksmiths, welders and carpenters. Short-training programs in these fields would address the communities' dissatisfaction with these services as well as create job opportunities.

NASIR COUNTY

- In light of the low-levels of education, violence associated with cattle raiding, and food insecurity, vocational training programs should be designed in such a way as to provide both immediate income-generating activities and training in skills that will support long-term employment. This will help to limit the number of dropouts and provide youth immediate alternatives to idleness and conflict.
- Nasir County was greatly affected during the decades-long civil war with the North and as such, a high degree of the population is comprised of single mothers who have received little to no formal education, but now serve as both parent and wage earner for the entire household. In order to accommodate this demographic and encourage participation, programmes targeting women should be offered in the evening.
- Given that male youth in Nasir are at risk of engaging in cattle raiding and associated violent acts, it is important that vocational training programs incorporate conflict resolution/mitigation techniques.
- Introducing farmer cooperatives/producers associations would address the burden of materials needed for agricultural initiatives (as opposed to providing materials for single households) as well as help distribute the burden of labour required for successful farming; supporting animal husbandry and beekeeping programs would assist in expanding the volume of available food resources. Given the lack of seed variety and primary focus on cultivating maize, farming initiatives should incorporate horticulture.
- Interviews with individuals and community leaders revealed a high demand and need for general business skills and English language training.

- Technical skills training should include large-scale agricultural projects, but also plumbing, irrigation, carpentry, construction, mechanics, and blacksmiths.
- Interventions should seek to improve the roads and other methods of transport, as the unavailability of materials and unreliability in delivering goods presents one of the greatest challenges for individuals seeking employment opportunities.

ULANG COUNTY

- Due to poor road connections exacerbated during the wet season, no projects should be implemented in the county that rely heavily upon goods or machinery sourced outside of the region. Due to a distinct lack of skilled labour, the same is true of any projects that will require skilled maintenance of equipment, as the workforce is simply not present to exercise these skills.
- There are currently no opportunities for vocational training in Ulang, an issue requiring urgent attention. Although training preferences amongst Ulang's residents were cited as, amongst others, engineering, mechanics, electrics, accounting and architecture, a pragmatic approach must be taken and consideration given to the practicalities of such courses without the accompanying industry and infrastructure to provide employment opportunities post-graduation.
- Agriculture should also be considered a potential area for development, although unpredictable weather conditions could leave many vulnerable during harsh seasons should families be overly reliant upon the industry.
- Unemployment and consequent idleness remain chronic ills. However, in order to combat these, certain underlying issues must first be addressed, namely security—primarily inter-tribal conflicts and aggression—and the ever recurrent issue of capital with which to invest. It is clear that local residents place much emphasis on prestigious government and NGO employment, at the expense of private enterprise.
- Education further lacks deeply, with principle areas for concern lying in a lack of school buildings and low female enrolment in education. Even temporary shelters would provide a more positive learning environment and allow schooling to continue during the weeks of the wet season when holding school outside is not an option. Consultations should be held with parents and community leaders to stress the importance of girl child education for the community as a whole. Currently, families show a tendency to focus only their immediate situation and not on future possibilities.
- In the market place, the best performing goods and services were those that were locally sourced and those with few barriers to entry. Those involving equipment or technology were generally not present or unfavourably rated, due to establishment costs beyond the means of providers and purchase prices beyond the means of residents for non-essential goods or services (e.g. photographers, computer repair technicians, etc.). As such, projects implemented locally should remain simple and pertinent to the lives of Ulang's residents.

- Given that the principle barrier to self-reliance was repeatedly cited as a lack of capital, the introduction of microfinance savings and credit associations would be extremely beneficial to the area. Currently, none exist. This should also aid the problem of vendors rejecting custom due to insufficient capital to purchase additional stock, thus boosting the capacity of the market. If reinvested wisely, the extra income generated for the community should go some way to increasing the overall economy of the area, halting the cycle of low income amongst consumers creating financial strain for market sellers.

PANYIKANG COUNTY

- A shift in trade practices must occur. Products are no longer sourced from Khartoum and must be sourced from elsewhere at much-elevated prices, affecting several livelihoods. Given that these are no longer sustainable in their current form, new work practices must be established.
- Hunger remains a paramount problem and residents demonstrate little focus on industry and training until this basic need has been met. Despite being currently dependent on grain brought in from outside the region, it is felt that the region can benefit from favourable growing conditions and, given investment and training much progress could be made in this area.
- Political instability continues to blight the area and must be addressed before progress can be delivered. Problems include cattle rustling, which must be addressed by bringing together community members and fostering peace amongst the different ethnic groups and sub-clans.
- Youth continue to abandon education in favour of income-generating activities. If the financial security of the community at large could be addressed, it would greatly aid the motivation of youth to continue education.
- One CBO, Youth Agencies for Relief, Rehabilitation and Development of South Sudan (YARRDSS) has operated a Village Saving Loan Association (VSLA) aimed at engaging women in microfinance projects with much success, although the scope should be extended.
- There are high levels of dissatisfaction with the markets in Panyikang, with only the most basic staples meeting satisfaction levels. The market is still lacking in many items and many people travel to Malakal to combat high prices in the local markets. The majority of poorly performing products are sourced externally, confirming that the principle difficulties in the market rest in the inability to source affordable goods from outside of the area.
- The majority of vendors surveyed in the market engaged in the provision of goods rather than services offering a wide range of merchandise. Satisfaction levels amongst services remain low, offering the possibility for development work in this area.
- Once again, the shifting of the supply chain from Khartoum to Juba has decimated many local enterprises and a period of adaptation is still on going, resulting in current economic hardship for those affected and resulting in pervasive pessimism.
- Market stallholders have received very little training with most learning from each other. No current vocational training centres operate in the area, although, given the opportunity, preferences were cited for training in mechanics, electrics and tailoring. It must be noted that

- the few who had received any training in these areas found operating in them impractical.
- Unemployment is still endemic in the area, placing many under severe pressure and forcing women into the marketplace to earn enough money to feed their families. Despite income-generating activities recognized as suitable for women being limited to tea making and restaurants, women remain positive about their role in society; declaring themselves keen to operate in business should the capital be available and strengthening an argument for microfinance schemes.

02/JONGLEI

A market assessment was conducted in Bor, Jonglei, for the MDGF Youth Employment Programme. It part of the five locations researched in the report: *Youth Employment & Livelihood Baseline Assessment on Skills & Market Opportunities*.

2.1 /INTRODUCTION TO ASSESSED AREA

Bor is located in Bor South County, Jonglei State, roughly 190 km north of Juba by road. Bor South has a population of 221,106 and like most of South Sudan, the people of Bor suffered greatly during the civil war.¹⁴⁸ MSF estimates that the population dropped from 85,000 to 2,000 during this time.¹⁴⁹ In the events leading up to the Referendum in January 2011 and independence in July 2011, those who had previously sought refuge outside the country have begun returning. UNHCR estimates that as of July 2011, 4,327 people had returned from abroad to Bor South County.¹⁵⁰

Most of the people living in Bor and the surrounding area are pastoralists, placing great emphasis upon cattle as an asset, means of livelihood and cultural resource. During the war, however, many pastures were destroyed, and even to the present day cattle herders are afraid of being attacked and therefore cannot go as far in their search for pasturage. These factors have meant that milk yields from cattle have decreased greatly compared to pre-war levels. In fact, some families with young children will choose to stay outside of the village, near the cattle camps, in order to access fresh milk for their children.

Bor is also located on the banks of the White Nile, and fishing is an important means of making a living for the population. A very large percentage of youth fish, using techniques learned from their elders, and sell it either fresh or sun dried in the traditional way, 'sodop', in which the scales are removed and then the fish is cut into strips and left to dry in the sun. The two main types of fish caught are the larger, but reportedly less savoury Leek Fish, which are sold at 3 SPP each, and the smaller but preferred Tilapia, sold at 5 SPP each. Fishermen interviewed stated that the fishing camp was four hours away from Bor town, and women selling dried fish stated that they travelled similar or longer distances in order to purchase dried fish, primarily to Akwak.

In 2009, there were 31,908 children in primary school in Bor, which equates to 65% of the children aged 6-13.¹⁵¹ In Jonglei as a whole, only 19% of people aged above six can read and write.¹⁵² In Bor South County, of which Bor is the main urban centre, 80% of households rely on agriculture for sustenance, with an average of 0.63 hectares cultivated per household.¹⁵³ The Famine Early Warning System supported by USAID currently classes Bor as a region where there is 'stressed' levels of food

¹⁴⁸ Statistical Yearbook for Southern Sudan 2010, Southern Sudan Centre for Census, Statistics and Evaluation, p.27

¹⁴⁹ Doctors Without Borders 2006 —A Hard Peace to Return to in Sudan

¹⁵⁰ IOM 2011, —Return Statistical Weekly Update (July 20 to July 26, 2011), p. 8

¹⁵¹ Southern Sudan Centre for Census, Statistics & Evaluation 2010, —Statistical Yearbook for Southern Sudan 2010, pp.54, 58

¹⁵² Ibid, p.48

¹⁵³ Ibid, p.89

insecurity, or category two on a five-point scale.¹⁵⁴ Therefore, although most people farm to produce food, there is still insufficient food available.

2.2/SELECTED FINDINGS

Consumers were **most satisfied** with sun dried fish, fresh fish, and rolexes. As Bor has a large fishing industry the satisfaction with fish is unsurprising, however there was a big disparity in satisfaction rates between salted (40.0%, n=12), smoke dried fish (38.7%, n=12) and sun dried fish (77.4%, n=24). Fishermen interviewed in Bor indicated that they only knew how to sun dry fish, as this was the traditional way of drying it, and family members had taught them this skill. They therefore divided their catch between selling fresh fish (which they said had a higher profit margin but a smaller window in which to sell the product), and sun dried fish. Salt and smoke dried fish were imported from elsewhere, therefore there was less supply. Over all youth respondents, the average stated price of a smoke dried fish was 11.3 SSP, for a salt dried fish 10.8 SSP, for a sun dried fish 14.7 SSP, and for a fresh fish 16.1 SSP.

BOX 9: GOODS WITH HIGHEST DISSATISFACTION, BOR, 2011

Bags (86.2%, n=25)
 Textiles (86.2%, n=25)
 Imported Fruit & Vegetables (77.4%, n=24)
 Local Straw Products (85.7%, n=24)
 Prepared Food (82.1%, n=23)

Every person interviewed was **dissatisfied** with yoghurt, suggesting this is a product where there is great room to capture the market. As well as yoghurt, over three quarters of respondents were dissatisfied with textiles, prepared food, machinery, local straw products, imported fruit and vegetables, electronics, butter, bicycles and bags.

BOX 10: SERVICES WITH HIGHEST DISSATISFACTION, BOR, 2011

Cut Fruit & Vegetables (45.2%, n=14)
 Rolex (35.5%, n=11)
 Mechanic (29.0%, n=9)
 Dobbi (25.0%, n=8)
 Computer Technician (22.2%, n=8)
 Mason (22.2%, n=8)
 Milk from Dairy (22.2%, n=8)
 Tailor (22.2%, n=8)

Of those who utilized services, respondents were **most satisfied** with the services of restaurants (80.7%, n=25). The highest levels of **dissatisfaction** were for the services of cut fruit or vegetables (45.2%, n=14), rolex makers (35.5%, n=11), mechanics (29.0%, n=9), dobbi (25.0%, n=8) and 22.2%, n=8). Cut fruit and vegetables and rolex makers are also among the most used services, showing a high

potential for an improved service capturing a high proportion of the market, however these do not necessarily represent — trainable skills. In terms of short-term vocational training, the high levels of dissatisfaction with mechanics and masons indicate a potential market ready for expansion by trainees.

¹⁵⁴ Famine Early Warning System 2011, —South Sudan Near-term Outlook, URL: <http://www.fews.net/pages/country.aspx?gb=ss>

BOX 11: LEAST CONSUMED SERVICES, BOR, 2011

Blacksmith (80.7%, n=25)
Plumber (80.7%, n=25)
Gravel (80.7%, n=25)
Appliance Repair (76.7%, n=23)
Caterer (80.0%, n=22)

Of the 31 people interviewed, over three quarters had **never used the service** of appliance repair, blacksmith, plumber, housekeeper, caterer, driver, garbage and straw collectors, security, messenger, or stone splitter (gravel producer) suggesting that the potential market for these skills may be very small. Many of these skills, such as a driver and housekeeper are expensive luxuries. Such services

are out of the reach of most South Sudanese. Conversely, over three-quarters of respondents had used the services of a phone charger, restaurant, doctor, tailor, rolex maker, and bought cut fruit and vegetables. Of all the services utilized, respondents were most likely to have been to a restaurant, with only 3.1% (n=1) never having been. Similarly, only 6.5% (n=3) of respondents had never bought a rolex.

2.3/JONGLEI CONCLUSIONS & RECOMMENDATIONS

The main complaints expressed by respondents regarding goods and services available

- Given the very high percentage of respondents who had used catering services such as rolex makers and restaurants, catering has a very large, untapped market, and might well provide many opportunities for employment. However, it would be important that this training also be paired with tool kits to include the necessary utensils and supplies for cooks to move beyond street food and be competitive within the market.
- A very high percentage of respondents indicated dissatisfaction with a variety of goods due to a lack of supply. Supply chains seem to be a problem in Bor, and interventions targeting this would be likely to open up new market opportunities for people presently unemployed, as well as increasing the availability of goods available to consumers.
- Respondents who had received vocational training were no more likely to be employed than those who had not. Any vocational training planned in the future therefore needs to ensure its students are supported into employment, rather than the training being seen as an end, as employment does not necessarily follow.
- By teaching people to produce goods locally, the difficulties associated with the transportation of goods in South Sudan - especially perishables such as butter and yoghurt - will be taken out of the equation, thus allowing for higher profit margins.
- Given that one business owner reported problems in his attempts to train youths in block making, any vocational training should be preceded by or include a workshop on the benefits of the training, and the justification for delayed rewards in such cases. This might reach out to youths who would otherwise fall at the first hurdle of training.
- Given the high percentage of youth respondents aged 24-30 who had several dependents, coupled with the low levels of education this same age category, interventions aimed at this group would both be addressing an urgent need and would be likely to have a wider impact, as those depending on them for income would also be positively affected.

- Youth in Bor with no education clearly have very few options available to them for employment, and 74.5% of them fish. Any training providing these youth options to expand their fishing into a marketable business rather than a survival strategy could assist in reaching this critical group.

03/UNITY STATE

As part of a series of market and baseline assessments for UNHCR, Forcier Consulting completed its report covering Rupkona in Unity State, titled: *Market & Livelihoods Assessment for Returnees*.

3.1/INTRODUCTION TO ASSESSED AREAS

With a poverty headcount rate of 68.4%, Unity State is among the most impoverished areas of South Sudan,¹⁵⁵ with the population of Unity State being predominantly rural (90.6%).¹⁵⁶ 56.3% of Unity State households earn their livelihoods through crop farming, and 9.7% earn their livelihoods through livestock rearing.¹⁵⁷ Compared to the rest of South Sudan, a relatively high per cent (18.3) of households are primarily dependent on wage labour.¹⁵⁸

According to the National Bureau of Statistics, average per capita consumption in Unity is 72 SSP per person per month compared to 100 SSP average across all of South Sudan.¹⁵⁹ In Unity State, the average consumption of the poor in is 36 SSP per person per month compared to 148 SSP per person per month for the non-poor.¹⁶⁰

In Unity State, natural resources include: grass, timber, fish, oil, and gas. The oil and gas resources are all exported to a refinery located in Khartoum for processing. Currently, the local government receives no compensation from the North for these resources. Local fishermen acquire their catch from the River Naam.

RUPKONA

Rupkona county is the second most populous in Unity state, with a population of 100,236, and an area of 3,597.24 km².¹⁶¹ It has a high returnee population. Before returning to Rupkona from Khartoum, many of these returnees worked in construction, agriculture, carpentry, clothes washing, and charcoal making. Some of the women returnees have found work washing clothes and farming small vegetable gardens, but most of the men are unemployed or only able to find irregular manual work. Businesses that sell imported food and clothing, as well as tools for cultivating, are most successful in Rupkona Market—the main market for Rupkona. Currently, vocational training is not available in Rupkona. If training was available, community representatives indicated that training in agriculture, business, tailoring, water purification, and cooking would be most helpful. In addition to vocational training, access to microfinance is greatly needed. The 2010 business survey listed 305 registered businesses in Rupkona. The survey notes that 74% of these are shops while 10% are restaurants and hotels.¹⁶²

3.2/SELECTED FINDINGS

THERE WERE A NUMBER OF PRODUCTS THAT SATISFIED OR DISSATISFIED ALL RESPONDENTS. THE TWO PRODUCTS THAT SATISFIED ALL RESPONDENTS WERE GOAT OR COW MEAT AND CHARCOAL. ALL OTHER PRODUCTS GARNERED LEVELS OF

BOX 12: GOODS WITH HIGHEST DISSATISFACTION, RUPKONA, 2011

Butter (100.0%, n=32)
Packet Milk (100.0%, n=32)
Imported Grains (100.0%, n=32)
Flour (96.9%, n=31)
Eggs (96.9%, n=31)
Imported Fruit (96.9%, n=31)
Powdered Milk (96.9%, n=31)
Imported Vegetables (96.9%, n=31)

¹⁵⁵ World Bank (March 2011), „A Poverty Profile for the Southern States of Sudan, p. 25

¹⁵⁶ Ibid, p. 28

¹⁵⁷ Ibid, p. 29.

¹⁵⁸ Ibid, p. 29.

¹⁵⁹ SSCSE (2011) „Key Indicators Unity, p. 4

¹⁶⁰ Ibid. p4

¹⁶¹ Statistical Yearbook for Southern Sudan 2012, p. 12

¹⁶² Ibid. p.4

SATISFACTION BELOW 56% OF ALL RESPONDENTS, CONSIDERABLY BELOW IN MOST CASES. SINCE ALL RESPONDENTS WERE SATISFIED WITH THE MARKET FOR CHARCOAL AND GOAT AND COW MEAT, THIS IS NOT AN AREA IN WHICH PEOPLE SHOULD BE TRAINED OR ENCOURAGED TO SET UP BUSINESS.

The four products that dissatisfied all respondents were imported grain, imported clothes and footwear, butter, and packet milk. Very high levels of dissatisfaction were expressed for flour (n=31, 96.9%), prepared/processed food products (n=27, 84.4%), toiletries and beauty items (n=28, 90.3%), nuts (n=27, 84.4%), spare parts for bikes, cars, and bodas (n=26, 81.3%) eggs (n=31, 96.9%), slaughtered poultry (n=27, 84.4%) imported fruit (n=31, 96.9%), local vegetables (n=24, 85.7%), imported vegetables (n=31, 96.9%), local bread (n=26, 81.3%), yoghurt (n=31, 96.9%), fresh milk (n=29, 90.6%), powdered milk – NIDO (n=31, 96.9%), and accessories (n=25, 80.6%).

Only 13% (n=4) of respondents had never tried to buy local fruit. In contrast, 56% (n=18) of respondents were dissatisfied with the market due to the poor quality of local fruit. Increasing production of local fruit is therefore a potentially lucrative area of agriculture, although fruit can take a relatively long time to grow. Local vegetables were a product that had similar responses: only 13% (n=4) had never tried to buy them, but 50% (n=16) were dissatisfied with them due to their poor quality. As vegetables generally have a shorter growing cycle than fruit, this may be one area in which short-term livelihood trainings and interventions could quickly show benefit for the local community.

BOX 13: SERVICES WITH HIGHEST DISSATISFACTION, RUPKONA, 2011

Hiace (100.0%, n=32)
 Restaurant/Bar (96.9%, n=31)
 Photographer/Videographer (96.9%, n=31)
 Mason or Bricklayer (83.9%, n=26)
 Beautician (78.1%, n=25)

As there is felt to be a lack of supply of imported vegetables, with 72% (n=23) of respondents indicating they were dissatisfied with these due to a lack of supply, local production of vegetables could also target this section of the market.

Although only one respondent (3%) was dissatisfied with live poultry due to a lack of supply, a full 91% (n=29) of respondents were dissatisfied with eggs due to a lack of supply. Interventions targeted at increasing the laying ratios of hens, and of introducing the concept of rearing poultry in order to sell their eggs, rather than the rearing chickens as poultry meat, would be beneficial for Rupkona.

TABLE 29: TOP FIVE UNCONSUMED GOODS, UNITY STATE, 2011-2012

Goods	Services
Local Wood Products and Furniture / Local Metal Goods 87.1% (n=27)	Caterer 93.3% (n=28)
Second-Hand Clothes and Footwear 65.6% (n=21)	Plumber 90.6% (n=29)
Street Food / Packaged Juice 62.5% (n=20)	Products from a Dairy Farmer 68.8% (n=22)
	Street Food Vendor 62.5% (n=20)
	Construction Worker 54.8% (n=17)

A significant number of respondents tended to consume all products, with the exception of local wood products and furniture (n=27, 84.4%) and local metal goods and metal furniture (n=27, 87.1%).

In contrast to the low rates of people who bought simple street foods, all but one respondent had patronized a restaurant. All other respondents were dissatisfied with restaurants due to their expense (94%, n=30). Similarly, 91% (n=29) of respondents had never used or tried to use the services of a plumber, suggesting this would not be a skill with which people could easily find employment. Although it is a highly skilled service, only 22% (n=7) of respondents had never tried to use a computer technician, and 75% (n=24) said there were not enough of them. Only 16% (n=5) of people were dissatisfied with barbers, suggesting this is not a market with a large opportunity for growth. As 72% (n=23) of respondents were satisfied with the teashops in Rupkona Market, this is also not recommended as an area in which people should be encouraged to open a business.

3.3/UNITY STATE CONCLUSIONS & RECOMMENDATIONS

Prioritization of livelihood/business options for Returnees

- A short training program on poultry keeping for maximising egg laying should be offered, particularly in the returnee community as this requires little land. In addition to poultry keeping, business skills should be offered so that trainees can start businesses selling eggs in the market.

General Recommendations for Rupkona Interventions

- Any vocational training programs implemented should make it a priority to incorporate small scale lending upon completion of the course in order to start up/expand a business. In addition, trainees should be given basic money management skills and supported in their search for employment.
- Generators are used to run irrigation systems; thus, generator repair training would benefit the service and agriculture sectors.
- Agricultural training should be given, with a goal towards increasing local production. As this is also an area that women are interested in, it will give them a broader range of opportunities.
- Training in keeping livestock for business rather than personal purposes should be offered, particularly in small animals such as chickens and goats. Training in butchering and preparing these animals for sale would dramatically increase the value of the product, as well as ensuring better hygiene practices for the population as a whole.
- A short training program on poultry keeping to maximise egg laying should be offered, particularly in the returnee community, as this requires little land. In addition to poultry keeping, business skills should be offered so that trainees can start businesses selling eggs in the market.
- The number of people who own cows in the area around Rupkona should be investigated, and if there is the possibility of increasing the availability of milk in the market this should be emphasised as a profitable opportunity. Training in the production of secondary dairy products such as yoghurt, sour milk and butter would be a possibility if more milk becomes available.

- Specific vocational training, such as courses in electrician and generator technician training, should be offered on a competitive basis. These are more specialised trades and the market could not absorb large numbers of new trainees, though it would benefit from small groups
- Every effort should be made to identify business owners in the market who already advise and train others, but who are finding it difficult to source candidates with the basic skills needed to start an apprenticeship. UNHCR should seek to partner with these businesses, offering courses in the basic certificates of appropriate trades with the intention of trainees completing their training with a local businessman. This will both cut down on program costs and effectively utilise the existing facilities within Rupkona.
- Training on opening a restaurant should be considered to help people to find employment. In this training there should be a large emphasis on ways to keep down costs, as the majority of respondents in Rupkona Market felt restaurants were too expensive.